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DEPARTMENT OF ECONOMICS
RESEARCH MEMORANDUM



**TOURISM TO CURACAO: a new deal based
on visitors' experiences**

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FEW 409

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based on visitors' experiences**

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MANAGEMENT REPORT

This management report contains a short review of aspects that gave inducement to write this thesis, the framework of the research, the results and recommendations.

inducement

Several factors induced a study of tourism to Curaçao:

- After a relatively flourishing period, of tourism originating from the United states, the number of Americans visiting Curaçao decreases despite excessive (financial) promotion effort. Also Venezuelan tourism collapsed after the devaluation of the Bolivar, which had substituted American tourism onwards 1975. A study of the current touristic product can provide insights which can help to develop a touristic product which distinguishes the island from other holiday destinations.
- In several sectors the economical activity is stationary or even decreasing (oil industry and financial off-shore). Earlier studies show that tourism has a lot of potential to become a major area of economical activity to compensate the decrease of other areas.
- Political and non-political factors seem to prevent tourism to become a major area of economical activity. Features of these factors are slow decision-making, no or only marginal improvement of aspects which are important to tourism and not exploiting the available opportunities. Perhaps new views from a different angle can add something to earlier reports which stimulate (tourist) authorities to give tourism a higher priority.

framework

By means of interviewing visitors, current markets were studied. With the questionnaires about the market more insight regarding respondents' features are obtained and therefore markets can be identified and localized more effectively. Furthermore, respondents were asked to give their opinion regarding touristic aspects. With the help of these data, factors can be distilled which are important to respondents and which might be improved. Also from these questionnaires, an indication can be given how to approach markets in the future.

The sample consisted of 500 respondents from all kinds of areas. Holiday stay-over tourism constitutes the major part of this report. Besides holiday tourism attention was given to cruise, shopping and business tourism

results

The greatest and most important differences between the importance and quality ratings of aspects were found in the primary holiday aspects (sun, beaches, hotel location, hotel price, hotel restaurant, restaurants in general, complaint processing and tropical environment).

The quality of most of these aspects have to be brought on a higher level. They have to be improved in order to become more competitive in the Caribbean area. Especially, because these aspects are also available on other islands and where quality of these aspects is often better.

If the aspects related to the primary holiday needs are brought on a level that is equal or higher compared to other islands, aspects next to the primary holiday aspects become important. These secondary holiday

aspects should be emphasized then in order to increase the chance that Curaçao is chosen instead of another island. Especially those aspects are important which have high scores on quality (architecture, culture and other sights).

For the primary holiday aspects these results mean that:

- new beach facilities have to be created or facilities on and transport to better beaches located elsewhere on the island should be improved.
- the government should, at last, undertake measures to improve cleanliness on the island by means of improving the people's attitude regarding garbage dumping and by an extension of the garbage collection services.
- areas, away from Willemstad, have to be used. Around picturesque landhouses in the neighbourhood of more promising beaches, rooms could be built in the same style as the landhouses.
- a price/quality ratio has to be achieved which is perceived as reasonable by visitors. Room prices, for example, should be in congruence with other prices like for instance restaurants. Prices charged should be in congruence with the quality of the product or service offered.
- Besides improvement of quality, restaurants should pay more attention to atmosphere and they should contribute to a more culture related image by adding (tested) culture related meals on their menu.
- The level of skill and training of employees have to be improved in order to increase the amount of service offered and professionalism with which it is offered. Employees should also be trained in skills that improves the speed and the quality of solving the guests' complaints.
- the tropical environment can be improved by adding tropical plants and flowers in and around the hotels and the innercity.

For the secondary touristic aspects this means improvement of the presentation of cultural and historical assets of the island. This way the island might be given a clearer identity with which it can distinguish itself from other islands. This means that:

- special attention should be given to the preservation of architecture
- the cultural diversity should expressed more
- the historical and cultural background should be enforced within a vivid and varying night-life

Other sights (Christoffel park, Boca Tabla, Hato etc) should be made more inviting and accessible. In a lot of cases this means cleaning up the garbage, more signs in special colours should be placed on the road to these sights. More information regarding sights should also be provided in hotels, in the city and at the cruise terminal.

new markets

An indication is given how to move to higher spending segments. Besides product and service improvements other marketing tools (price, promotion and distribution) may help to move to these higher spending segments.

Promotion demands a two sided approach:

- 1) improvement of the image Curaçao has among travel agents by means of promoting significant improvements of the touristic product and services.
- 2) increase of awareness among potential visitors by means of an awareness campaign followed by promotion campaigns which support a move to higher spending segments.

Improvement of the distribution of the tourist product may be achieved by improvements regarding the reputation, relation and the exchange with travel agents. Monitoring costs and effectivity regarding travel agencies should receive special attention. Standards to measure effectivity of contact persons and travel agencies are recommended.

With the improvement of the tourist product and service an increase in price supports a move to higher spending segments. This way:

- the margin between price and costs is increased
- the price elasticity, which is probably higher for low incomes, might be decreased
- profitability of hotels might be increased. The profitability of hotels is until now very poor, despite relative high occupancy rates

market data

The market data presented may become input for new policy plans besides a tool to approach current segments more effectively. With these data more insight concerning effects of certain measures can be obtained.

The data provide information about visitors' features and information about the rating and ranking of the present touristic products and services.

2. INTRODUCTION

"Analysis of the economic situation on Curaçao indicates an impending crisis of major proportions, characterized by a decreasing national income, increasing unemployment (from an already high level) diminishing foreign exchange revenues and a growing imbalance between government revenues and expenditures. The only way for Curaçao to avert this crisis will be to implement a development strategy based on the stimulation of significant levels of investments particularly in foreign currency generating activities¹."

At the top of the list as suggested by A.D. Little is tourism. In the selection process, those areas were chosen which would be most attractive to private investors and which offer the most employment. Earlier experience with tourism, the advantageous location of the island with, from a tourist point of view, important attributes like sun and sea make it almost natural to exploit these characteristics. Given the choice of tourism, despite all objections which are levelled at tourism to small islands and/or developing countries², it is necessary to constantly monitor operations. Especially when the dependence on tourism becomes more and more important for the national economy.

Much discussion has taken place concerning the definition of what a tourist is. As early as 1937 The League of Nations already gave a first description³. Since then, the definition has been changed several times. Nowadays the definition used in the statistical material of the WTO is used. Their starting point is the visitor⁴. A visitor is: "any person visiting a country other than that in which he usually resides for any reason other than following an occupation remunerated from within the country visited". Two types of visitors can be distinguished: the tourist and the excursionist. The tourist is someone who stays at least 24 hours in the host country for reasons of business, family, friends, meetings, relaxation, health, religion or sport. Excursionists are people who stay

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- 1 A.D. Little; investment opportunities for economic revitalization of Curaçao p.3
 - 2 M. De Vaan; Abo ta Corsow, een exploratief onderzoek in de toeristensector op Curaçao met bijzondere aandacht voor de werkgelegenheid in het hotelwezen, Leiden 1982
 - 3 H.L. Theuns; Internationaal Toerisme: omvang, verspreiding, groei en betekenis 1973. The description of the League of Nations was: "Any person visiting a country, other than that in which he usually resides, for a period of at least 24 hours: a) a person traveling for pleasure, for domestic reasons, for health etc. b) persons traveling to meetings, or in a representative capacity of any kind c) persons arriving in the course of a seacruise even when they stay less than 24 hours."
 - 4 WTO; economic review of world tourism, Madrid 1978

less than 24 hours in the host country (transit passengers) including visitors of cruises.

Besides this description of a visitor one can distinguish types of tourists and the reason why they travel. Concerning persons who travel for recreational reasons, Cohen⁵ states that: "People travel in search of cultural affirmation" and describes five modes of vacation.

- a) **The diversionary mode:** People seek nothing else but a way to escape the monotony and the uselessness of their life in their home country.
- b) **The recreational mode:** People who want to experience the host culture but don't want to get involved with it. They are satisfied when they see the location from out coaches and visits to played events.
- c) **The experiential mode:** This mode introduces the idea of cultural validity; this type of traveller is alienated from his own community and is looking for "meaning" in the life of others.
- d) **The experimental mode:** Travellers find pleasure and affirmation in the authentic life of others but don't surrender themselves completely to the life style of the host country.
- e) **The existential mode:** This mode concerns tourists who, to a great extent, are prepared to surrender to the host culture. They are pushed and pulled between "home" and their chosen (spiritual) centre.

In an earlier article Cohen⁶ discussed the degree of contact between host population and visitors and divided the latter group into 4 basic types.

- 1) **The organised mass tourist:** They don't have any contact with the host population and its culture because the hotels and other facilities are developed especially for the tourists. This type of tourist doesn't expect many differences with respect to the situation at home.
- 2) **The individual mass tourist:** The only difference from 1) is the organisation of the trip; the expectations are the same
- 3) **The explorer:** He travels to countries who are touristically "new" and which he knows from personal contacts.
- 4) **The drifter:** This is a tourist who dreams of discovering new places. He is often precursor of the mass tourist. The drifter wants to experience life in the host country completely.

These four groups are put together again in two groups, the "institutionalized" and the "non-institutionalized" tourists. The main difference between these groups is the fact that non-institutionalized tourists have not completely planned their route and travel details in advance. Mass tourists belong to the institutionalized tourists and the explorer and the drifter belong to the non-institutionalized tourists.

Curaçao is primarily visited by institutionalized visitors who travel in the recreational and experimental mode. On the one hand this requires a certain touristic product and service; on the other hand the institutionalization is caused by a certain touristic product and service. Facilities belonging to these modes of travel and types of tourist could

⁵ E. Cohen; A Phenomenology of Tourist Experiences, Sociology 13(2) '79

⁶ E. Cohen; Towards a sociology of international tourism, Social research 6(1) April '77

be improved in order to attract more tourists and to increase satisfaction. Also other facilities could be offered in order to appeal to other types of tourists as well.

In this thesis new opportunities, developed with the results of the questionnaires, will be presented. This thesis tries to describe ways how the tourist product can be improved and volume increased.

3. DELINEATION OF THE PROBLEM

Large investments have been made in hotels and infrastructure to develop a flourishing tourism. There are, however, factors which influence tourism negatively and therefore require a different approach of tourism. Factors which indicate problems in the tourist sector will be described below.

Figures of stay-over tourism show that there is a shift in country of origin. The number of visitors from the United States increased initially and reached its highest point in 1973. The years afterwards only show a decrease, which was compensated by primarily visitors from Venezuela and by a rest group which consists of travel originating from South and Central America and the Caribbean area (see table 1).

Table 1 Stay-over and cruise tourism to Curaçao. Stay-over is divided into place of residence

year	cruise tourism	stay-over tourism	nationality		
			USA	Venezuela	rest
1973	168,932	123,206	59,042	31,245	32,919
1974	176,302	109,295	45,613	31,220	33,462
1975	178,946	103,328	28,517	41,142	33,669
1976	178,109	117,037	34,819	50,426	31,892
1977	193,524	133,532	28,009	65,033	40,490
1978	177,968	173,704	29,386	79,922	64,396
1979	173,965	180,638	25,601	82,382	72,655
1980	169,002	184,671	24,500	93,137	67,034
1981	128,416	176,269	27,710	82,684	65,875
1982	109,997	174,402	20,015	94,350	60,037
1983	107,104	110,616	21,128	24,863	64,625
1984	122,506	130,003	27,601	30,130	72,272
1985	108,779	127,564	24,162	25,392	78,010
1986	125,905	128,207	21,517	15,219	91,471
1987	N.A.	134,786	17,790	16,853	100,143

Source: Curaçao tourist bureau

Various types of tourists will have, depending on their goals and needs, certain demands and expectations regarding their stay on the island. De Vaan divides hotels on Curaçao in three categories: A, B and C⁷.

The North Americans will come mainly for "holiday tourism" and stay mainly in A-category hotels. The regional tourists are often shopping tourists and their purpose is to buy products which are much cheaper on Curaçao than in their own country. Shopping tourist stay mainly in hotels of the B and C category.

The increase in shopping tourism, originating from Venezuela, stopped abruptly as a result of a strong devaluation of the Bolivar. The advantageous price difference was diminished.

⁷ M. De Vaan; *ibid* p. 67-70

The difference between these two kinds of tourism can be described as follows. The North Americans and the Europeans come because of the island itself and will show the usual touristic features. Shopping tourists will have a more economic motive to visit the island.

Although shopping may be the most important reason, shopping tourists like holiday and business tourists, have clear opinions regarding aspects concerning tourism on Curaçao. This was already made clear by a research of the Stanford Research Institute in 1975⁸. During this research guests were asked to give comments concerning their experiences gained on Curaçao.

Different categories of passengers were asked to name their least highly rated factors which are listed below (table 2).

Table 2 Least highly rated factors in Curaçao specified to passenger categories and related to December 1974

factors concerning hotels	scheduled air passengers	charter air passengers	cruise- ship passengers	ferry passengers
-hotel prices	1	1	1	1
-hotel telephone and communication service	2	5	5	8
-hotel beaches	3	10	-	-
-hotel entertainment	4	-	10	-
-hotel room service	5	-	-	3
-attitude hotel employees	6	-	-	2
-hotel restaurant	7	6	4	-
-hotel facilities and services	8	-	-	5
-hotel rooms	10	-	-	9
-hotel casinos	-	-	3	-
-hotel pool	-	-	-	7
other factors				
-restaurants	9	3	2	4
-floating market	-	2	7	-
-Willemstad shopping area	-	4	-	-
-Westpunt	-	7	-	-
-Curaçao liquor distillery	-	8	8	-
-botanical gardens	-	9	6	-
-car rental service	-	-	9	10
-taxi service	-	-	-	6

source: SRI visitor survey

⁸ Stanford Research Institute; Evaluation of tourism to Curaçao and recommended actions to ameliorate problems of the hotel industry, 1975 p. 62-64

From this list of 40 least highly rated factors, 25 were directly related to hotels. From this, one could hypothesize that in order to experience a stay positively, satisfying accommodations are required. Satisfying accommodations mean, in this context, accommodations which suit the expectations of the visitors. The situation within hotels was studied during a parallel research⁹.

From comments, given as "number of volunteered visitors comments" a list of attributes was drawn up which didn't meet visitors demands and expectations (negative comments) and attributes which did meet visitors demands and expectations (positive comments) (see table 3). From the comments, 29 positive against 190 negative, it is shown again that hotels often don't meet visitors' demands and expectations. Furthermore the table shows a division of comments concerning other attributes. All these attributes, because respondents were not asked specifically about these attributes, will be important to visitors. At least they will influence the valuation of the island. One ought to exploit the attributes commented on positively and improve the attributes commented on negatively.

⁹ Together with this research, the hotel industry was studied too. See L. Arts; Contingencies in the Hotel Industry

Table 3 Number of volunteered visitor comments. December 1974

area of concern	positive comments					negative comments				
	Eng- air	Spa- air	lish ship	nish ferry	cruise total	Eng- air	Spa- air	lish ship	nish ferry	cruise total
-attitude of employees in hotels and shops	3	15	5	1	24	13	45	21	12	91
-shops	1		3		4	7	31	20	7	65
-prices in hotels and shops	1		1		2	13	11	38	4	66
-taxi service			1		1	13	16	8		37
-hotel facilities and services	1	1	1		3	12	10	3	8	33
-facilities for money exchange					0		5	8		13
-toilet facilities					0				14	14
-bus service					0	1			9	10
-cleanliness										
-pollution			7		7	3	1	6		10
-guided tours					0	1	1	8		10
-beaches	1				1	6	2			8
-info availability					0	1			6	7
-signs					0	3			3	6
-ferry service					0				6	6
-airlines					0	2	4			6
-piers					0	3	2			5
-postal service					0			4		4
-town architecture	1	2			3					0
-entertainment					0	3	2			5
-beauty		2	6		8			1		1
-general	3	6	6	2	17	1				1
-other	3	1			4	8	10	13		31
	15	27	30	3	75	96	142	191	40	469

Source: SRI visitor survey December 1974

During the research, attention was focussed on the tourist and his experiences with the island. The decrease of the number of North American tourists and the loss of a great deal of the Venezuelan shopping tourism, though partly compensated by Haitian and Jamaican shopping tourists, raises the question if the tourist authorities can control the market to some extent. It seems that they don't know what the market is nor what the needs, wants and demands are. When the needs and the demands of a market are known and also what the demands concerning a stay are, one can adapt the product to these needs, wants and demands and in this way marketing activities can be controlled better. With a better knowledge, control and auditing of the market risk can be spread better.

For example, for visitors from Venezuela prices on Curaçao were attractive and formed one of the basic motivations to come. An external factor, in this case monetary, caused a total collapse. This example shows the dependency of a country and the need of risk spreading.

4. PROBLEM DEFINITION

On the basis of the foregoing the problem can be defined as follows. Due to a lack of market information, the marketing policy can't be aimed at certain target markets. This raises questions about:

- What the features of the market segments currently served are?
- Which touristic aspects are most important to visitors and how visitors rate the quality of these aspects?
- How aspects rated important might be improved?
- How market segments might be reached more effectively?
- Which markets might be focussed on in the future?

5. DESIRABILITY OF MARKET RESEARCH AND GOAL OF THE RESEARCH

5.1. DESIRABILITY OF MARKET RESEARCH

During the research the description of market features was emphasized. This paragraph will describe the desirability of market research.

The profitability of many hotels is low or negative, the number of visitors from the USA is decreasing despite large advertising investments. It seems that a considerable effort needs to be made regarding promotion and sale to receive a better occupancy rate in hotels, bars and restaurants. "... but it is no excuse for doing just that; it is both necessary and possible to proceed with changing the products: to establish who our customers could be and what their needs are (market research) and to formulate and develop products meeting their needs (product formulation and development). This approach ultimately calls for less sales effort, which is then designed to demonstrate to people that their needs can be met; it is of particular importance in hotels".¹⁰

Promotion expenditures are a measure of sales effort. When the promotion expenditures are viewed, Curaçao is at the top of the list compared with other Caribbean islands. Still the desired result isn't achieved. An attempt should be made to spend every promotion dollar, as well as every marketing dollar, as effectively as possible.

5.2. GOAL OF THE RESEARCH

Everyone working in the service sector is in fact part of the sales organisation. A negative attitude among personnel regarding service, which cause dissatisfaction among guests have to be compensated by extra sales efforts. Creating a "good" attitude and motivation among employees, can contribute to a reduction of sales expenditures.

Knowledge about the target groups and the target groups' needs increases the effectivity of marketing efforts. Expectations created will have to be expressed in attributes important for tourists. By studying visitors' features and needs, recommendations can be made to improve the touristic product on those attributes which are considered important by the visitor. Furthermore the results of the research can lead to recommendations regarding opportunities to reach (potential) tourists with advertising and distribution.

¹⁰ S. Medlick; The business of hotels 1980 p. 111

6. DISCUSSION OF THE RESULTS

The tables presented are in some cases extremely clear. First, the top 10 of importance items contains mainly aspects which are related to a holiday in a random hotel in the Caribbean, no matter the social class of respondents. Second, the majority of the significant differences and the combination of a significant difference and a difference in ranking that is equal or larger than 4, between importance and quality scores, primarily concern wants related to holiday destination and hotel and hence to be found in the top 10 of importance items. Third, because there is a substitution, in the whole Caribbean, for most of the top 10 aspects and they can be served elsewhere equally well or even better, other aspects become also important. Especially those on which respondents score (extremely) high on quality.

6.1. top 10 importance ranking

The ranking of the importance aspects can be summarized with the following key words: Holiday visitors come primarily for sun and beaches in a clean tropical environment, in a nice hotel which solves complaints fast and satisfactory and they expect good food at a fair price.

Sun, location and tropical environment most of the time meet the standard requested by the tourists. But, the whole Caribbean is a substitute for the preceding. The quality ratings often are on a lower level than importance which means that many aspects can be improved. The table below summarizes the situation.

The table shows that almost all statistically significant differences were found in the top 10 of the ranking. Second, as a consequence of the preceding, the largest differences between importance and quality are found among aspects which are easily substituted by other Caribbean holiday destinations. This ascertainment should initiate immediate action to improve the quality of these aspects. Especially those which show large discrepancies in rating as well as ranking. But first of all, how should the differences be interpreted?

BEACHES

To start with the beaches. This leads to a problem that, on first hand is difficult to solve. It concerns a fixed natural setting which is difficult and perhaps ecologically even reprehensible to adjust. Still beaches are very important to current visitors. Curaçao does not have natural long silver sand beaches. At least, not in the neighbourhood of the current hotels or city. It has better beaches, or bays, (i.e. in most cases better than the beaches located near the hotel) elsewhere on the island. The problem is transport, distance and loss of sales in the hotels.

Improvement of the accessibility of other beaches by improving transportation and facilities on these better beaches can increase the quality rating. This means that on a lot of beaches facilities have to be created. Lockers, toilets, cubicles and stands which sell beverages and/or food have to be built.

For example Boca Santa Cruz, Boca St. Michiel and Barbara Beach have better beaches. Beach Parties and barbecues can be held here more conveniently.

For the major beaches shelter roofs could be built and, ones built, also properly maintained as available on Playa Abao.

Facilities to be created should be on a level that it is possible to spend a whole day at these beaches. A hourly bus service should be arranged to transport guests to and from hotels. In order to overcome problems with the trade union of taxi-drivers agreements with this union have to be made.

Several options are possible:

1) creating a new taxi service. For instance by letting current taxi drivers drive small busses. Tickets for a trip to and from the hotel could be sold for 2 to 3 dollars.

2) The hotel offers the service and pays the union of taxi-drivers certain amount for the loss of business.

The taxi system as a whole could be improved by offering taxi services the way visitors are familiar with. This would mean installing taximeters which make negotiation about prices obsolete and hence better and quicker service. Second, the guest will perceive the price paid to be a fair price.

Although taxi prices are quite high, the average revenues per taxi aren't very high due to the number of taxis available on the island. A new policy regarding taxi licenses as proposed by Horwath and Horwath should be paid attention to. Should the number of guests arriving to the island increase, then new licenses might be distributed again.

CLEANLINESS

Cleanliness doesn't need much explanation. Most of the readers know how the situation is. Many places on the island still look more like a garbage dump than a touristic tropical island. The visitors score different on cleanliness. Some rate the quality of the cleanliness high others low. This difference in score merely shows that those who score low see more of the island than the hotel or Willemstad only. Although the authorities have increased penalties for dumping garbage and a more intensive campaign is running, structural measures to clean up the island haven't been taken. With exception of some clubs, who choose target areas and than clean it up, no one seems to be really interested in a cleaner island, neither for themselves nor tourism in particular. The results show that cleanliness is rated very important by most of the visitors. A clean island improves the beauty of it and not only for the tourists.

The island authorities, in order to decrease the amount of garbage, might assign people to first of all clean up and keep clean the areas most visited by tourists, second, the garbage on the route to touristic sceneries and places and third, the rest of the island.

In order to prevent people from dumping trash any time and anywhere, a service that may be called and that comes to pick up garbage which can't be picked up during the normal garbage collection might prevent people from putting old couches and the like into the car and dump it elsewhere. Also this service might contact people who have a car in the garden which isn't used any more and take it away.

Table 4 differences related to primary holiday wants

	<u>EUROPE</u>	<u>CANADA</u>	<u>USA</u>	<u>SOUTH AMERICA</u>
1.number of significant differences in the top 10	9	7	7	9
2.number of significant differences related to hotels or primary holiday demands	8	7	6	6
3.total number of significant differences	12	9	8	12
4.percentages of differences related to 1 and 2 (1:3, 2:3)	75% 67%	78% 78%	88% 75%	75% 50%
5.total number of significant differences for which quality is rated lower than importance	12	7	7	12
6.percentage of difference that is related to 1 and 2 (1:5, 2:5)	75% 67%	100% 100%	100% 86%	75% 50%
7.number of differences which are significant and difference in ranking ≥ 4	6	9	4	4
8.number of differences which are significant and difference in ranking ≥ 4 in top 10	5	7	3	4
9.number of differences which are significant and difference in ranking is ≥ 4 related to primary holiday and hotel wants	6	7	2	2
10.the percentage of 7 that is related to 8 and 9 (8:7, 9:7)	83% 100%	78% 78%	75% 50%	100% 50%
11.number of differences which are significant and difference in ranking ≥ 4 and quality rating is lower than importance rating	6	7	3	4
12.percentage of differences that is related to 8 and 9 (8:11, 9:11)	83% 100%	100% 100%	100% 67%	100% 50%

COMPLAINT PROCESSING

Importance scores on complaint processing show that hotel guests expect to be treated with the most possible consideration. For hotels it is impossible to offer the ideal solution for all complaints guests may have but all problems will have to be solved to a satisfactory level. This means that if the problem can't be solved totally, an alternative has to be given which convinces the guest that everything is done to remove the cause of his complaint and that everybody in the hotel (not only the management) takes the guest's complaint seriously. The preceding makes the job of a guest relation officer very important. But, the service within a hotel should be on a level that enables the guest to explain his complaint to every employee in the hotel. The employee must then know who to turn to or how to solve the problem¹¹.

RESTAURANTS

Restaurants and especially hotel restaurants don't seem to be able to bring the price and quality perception on a level which is in congruence with the importance level. More than a dozen restaurants can operate for an important part because of the guests of a half a dozen hotels. Compared to the hotel restaurants, the competition is more intensive. Probably because of this competition, restaurants not sited in hotels have to try harder and are more convinced that quality and atmosphere gives them an advantage. Hotel restaurants, which have an advantage because guests don't have to travel and guests don't have to look for a place to eat, don't seem to be able to profit from that advantage. High prices is not a guarantee for good food and prices have to be in congruence with the quality of the food, service and atmosphere offered and not only with the costs of preparation.

PRICE

With exception of the respondents from the United States, the results showed for all continents or countries a significant difference in the importance of hotel price and the quality of the hotel price (cheap, fair, expensive, very expensive). Price contains a psychological factor which causes people to not state easily that something is cheap. Especially in those cases where a lot of money is involved. The difference between the price and the subjective value of the good or service has to be extensive before people will call it a bargain. The subjective value is fed with experience. If also the purchasing power of the foreign currency on Curaçao is taken into account, the differences in perception of price importance and quality can be explained. A \$60.- room on Curaçao will, by people from the USA, be compared with a \$60.- room in the USA. But a \$60.- room on Curaçao will be compared with a fl 120.- room in the Netherlands by people from the Netherlands. In comparison with people from the USA, a room on Curaçao, because of the difference in purchasing power, is twice as expensive. The results show that with the increase of

¹¹More about the organisation of hotels and the position of employees within the organisation was studied during a parallel research (Contingencies in the hotel industry by L. Arts) which was conducted at the same time

the discrepancy of the purchasing power on Curaçao, the discrepancy between importance and quality scores as well as the difference in ranking increases. The latter is shown in the table below.

Table 5 perception of price importance and quality and their discrepancies for the various countries and continents

	importance	quality	discrepancy	importance ranking	quality ranking	discrepancy
1) USA	2.90	2.87	0.03	12	12	0
2) Canada	2.99	2.69	0.30	10	14	4
3) Europe	2.82	2.45	0.37	10	16	6
4) South Amer.	3.26	2.37	0.89	9	21	12

The ranking of the countries is equal to the ranking in purchasing power

HOTEL LOCATION

There was a difference between importance and quality rating of the hotel location more often concerning significance than ranking. Since hotels can't be moved other actions could be taken to improve the hotel location. For example, one could place a hotel in a sea of tropical delight. The whole surrounding of a hotel could be filled with all kinds of colourful flowers, plants, palm trees, tropical birds, tropical sounds etc.. To maintain the flora, a lot of water is needed. The re-use of filtered sewage water can help to decrease the costs of maintenance of this flora¹².

TROPICAL ENVIRONMENT

Like beaches, also the tropical environment is a fixed natural setting. Whether or not you like it is a subjective opinion. The difference between expectation of how a tropical island looks like and reality is most of the time caused by the image that people built fed by commercials or movie pictures. Curaçao is a dry island with a vegetation that is bushy and consists for a great deal out of cactuses. The difference between expectation and reality probably causes the significance. But, since tropical environment has a high quality ranking, visitors rank the reality high, although it is not in congruence with their expectation. Because of this high ranking, the difference between importance and quality rating becomes less serious.

The preceding 8 items were those which were mentioned in the top 10 of importance ranking and which showed a significant negative difference between importance and quality and in most cases also a differences in ranking ≥ 4 . The importance and quality ranking of the sun was in perfect balance and in most cases it performed its job even better than expected. A tenth item isn't discussed because for all countries this was an item that was unique for a certain country or continent but that hadn't a top 10 ranking for the other countries or continents.

¹² L. Arts; ibid

The aspects discussed up to now have to be taken in order to stay competitive on a higher level in order to stay competitive. As was stated earlier it concerned aspects which satisfy the principal holiday wants of the visitors but which are also easily substituted by other Caribbean islands. The second level holiday motivations come into view then. Those aspects which score high on quality and which present a clear advantage for Curaçao will be studied. This group consisted of Curaçaoan culture, architecture and other sights. All these aspects scored high on quality. The importance ranking (whether or not the respondents had scored on quality wasn't taken into account) of Curaçaoan culture, architecture and other sights of the various groups (high vs low income, age and education) of countries and continents were compared¹³. Then differences between ranking of respondents with high incomes, high degree of education and high age versus respondents with low incomes, low degree of education and low age, were put together. This exercise showed that respondents of the former groups rank culture, architecture and other sights higher on the importance scale than the latter group. This fact can be a handy tool for future segmentation.

6.2 secondary holiday aspects

The fact that culture, architecture and other sights are more important to the "ideal group" and the fact that these aspects have a high score on quality brings several advantages. First, it can distinguish Curaçao from other islands. For example, Aruba is very well known for its long silver sand beaches and Bonaire is well known for its excellent scuba-diving facilities and its underwater scenery. Until now, Curaçao has no well developed feature with which it can position itself nor with which it distinguishes itself from other islands. Second, the differentiation of respondents in two groups (those who rate culture, architecture and other sights high versus low) creates already two segments. Certain characteristics of a segment, to reach a certain group may be distinguished more easily. Add campaigns can be aimed more effectively at a selected group.

Positioning the island with a special emphasis on culture, architecture and sights would mean a positioning which aims at the "educational market". This means a market in which visitors, by means of activities offered, learn about the host culture and history besides a stay in the Caribbean with sun and water. But what is the meaning of culture, architecture and sights in this positioning strategy? These three aspects form the means to be able to position the island and they will be discussed below.

CULTURE

During the interviews, many asked what the Curaçaoan culture is and what makes it special. Curaçao is a perfect example of a melting pot of cultures with the Curaçaoan culture as a resultant of the other influences. This melting pot offers the opportunity to distil the various influences from this melting pot, offering a scale of historical events

¹³ South America was excluded since no division was made for this group

over 3 to 4 centuries. Influences of all these cultures have made what Curaçao is today and these traces of modern or ancient cultures can be experienced again in the daily life of the Curaçaoan people. This distillation offers the opportunity to create and organise activities which could make a package trip to several countries obsolete if visitors want to get a glance of other cultures on one spot. Since most visitors are frequent travellers, their knowledge of different cultures might be high. This knowledge may help them to explore the influence of other cultures on the Curaçaoan culture. An effect of seen and associated may become present. The melting pot of cultures offers also the opportunity to develop a varying night life. Every time every where a specific culture should be highlighted.

ARCHITECTURE

Curaçao has an architecture that is unique for the area. Especially Punda and some of the landhouses are well maintained and are of extraordinary beauty. The buildings in Punda accommodate primarily shops and some of the landhouses accommodate restaurants. Many, though, tumble down. There is no money to restore them all but once restored, the authorities don't seem to find an appropriate use for it (e.g. Landhouse Knip). The loss of landhouses is for Curaçao a loss of one of their most valuable assets. A new positioning of the island as a centre of culture and history can give new use to landhouses through which they will be preserved and which will turn them from a source of costs into a source of (indirect) revenues.

OTHER SIGHTS

Besides Christoffel park with its museum and the Seaquarium, Curaçao has many places which could be visited by tourists. Most of the time unfamiliarity and lack of information cause visitors not to experience the beauty of Santa Martha Bay, the plain near Hato etc. and in some cases sights are not inviting enough (i.e. wood bay). Development of these sights, but also of the museum, Boca Tabla, other bays where the underwater flora and fauna is much richer and interesting for snorkelers would increase the number of trips that could be undertaken and in this way increase satisfaction.

Horwath & Horwath (UK) Ltd wrote a tourism masterplan in which they developed a marketing strategy. Besides a description of the kind of hotels to be built, their size and location, they give, among other things, some options to characterize tourism to Curaçao. Their advice is very useful but in some cases very general. They predict numbers of visitors to come to Curaçao but they don't describe target groups and how and with what options to reach them.

In the following description of a marketing strategy is attempted describe and a marketing mix developed with the help of the results of the questionnaires. This method differs from the method Horwath & Horwath used in the sense that during this research visitors were interviewed while Horwath & Horwath used their own experience and questionnaires sent to travel agents.

The following must be seen as an elaboration of the results and recommendations presented by Horwath & Horwath, other consultancy reports written in this field and the research that was conducted at the same time (see note 12).

7. MARKETING STRATEGY AND MARKETING MIX

7.1. MARKETING STRATEGY

From interviews with tourism authorities and earlier studies it was found that the tourism authorities want to move to a higher spending segment in the tourist market and prefer the United States' market because this market has a lot potential, the Antillian Guilder is tied to the US Dollar so changes in currency exchange rates won't effect tourism immediately and this nation is relatively high spending. Especially in the shoulder months and the low season (summer) tourism from Europe might improve occupancy rates. But, tourism from Europe is more subject to changes in currency exchange rates. At the moment, the US Dollar is relatively low and therefore the Antilles are relatively attractive to visit for the Europeans. Should the Dollar rise, then the price elasticity will cause a decrease of European tourism. Besides financial advantages, a plea to move to a more expensive form of tourism could be that the price elasticity is lower for visitors with high incomes than for visitors with low incomes. The high costs (e.g. labour and goods) on Curaçao in comparison with other islands or countries in the area might also be a reason to move to a more expensive segment. This in order to increase the margin between price and costs. The price increase definitely needs to be associated with an increase in quality and as much as possible without increase in costs. In a lot of cases, this means reallocation of funds and improvement of efficiency and effectiveness.

7.1.1. SEGMENT

The segment at which the strategy is aimed has the following characteristics:

- origin: * The North East of the USA
 - * The South East of Canada (Ontario, Quebec)
 - * Europe (Netherlands, United Kingdom, Germany, Switzerland, Scandinavia)
- social class: The middle and upper class, the people have had a high degree of education (college, university) and who enjoy, in their free time, the good life
- income class: the potential market belong to the middle to high income classes ($\geq \$60.000$ or $\geq \text{fl } 70.000$)
- availability of time: depending on the country of origin, packages with different lengths of stay should be offered in the various countries. For the USA this would mean a 7 day trip, for Canada a package for 1-2 weeks. For Europeans, a holiday in the Caribbean will most of the time be their major holiday. Also taking travelling time into account, a 2-3 weeks package is most suitable.
- phase in the life-cycle: The segment is at an advanced stage in the life cycle. Most of them will have children that are older than 15 years and the majority will travel with spouse or partner.
- motivations underlying the buying decision: The most important motivations will be a stay in the Caribbean to enjoy the sun and the blue water in a tropical environment. But the stay must also offer a range of activities. These activities should be related to the visitors' special interests. This would mean offering the opportunity to learn about the historical and cultural assets which Curaçao has.
- likes and is like: Visitors come for a mental rest i.e. to escape the problems of daily life. They are interested in the country's culture and would be pleased to have some sort of contact with the local population. They like to do things on their own i.e. when visiting places, they prefer to be alone instead of walking around in a whole group. The segment wants to do something completely different, other things than what their normal daily life is made of. The segment will experience the monotony of daily life less.
- product preference: The segment prefers high quality and a high degree of service. High prices are less important as long as the price is in congruence with the quality and service offered.

Visitors will rather be individualistic. They will prefer to travel with spouse or partner perhaps accompanied by friends but they won't prefer travelling in whole groups. They must be able to make their own choices out a range of activities. In a lot of cases, valuation of the destination will depend on the amount of activities or sight-seeing places

offered. Valuation doesn't depend only on activities visitors really have taken part in or places visitors really have seen, also the amount of activities offered is important. It is better to let visitors make choices out of many activities offered instead of "forcing" them to visit the few activities that are available in order to pass the time.

Europeans, in general, tend to be more critical than visitors from North America. This will also be the case with respect to culture. For Europeans, experiencing culture is more common than for North Americans since Europeans are more exposed to all kinds of ancient cultures. The reason for this is the richness and vividness of European culture and history. Cleanliness and safety are very important to the visitors. Especially visitors from the USA have to have a feeling that it is safe. Whether or not the actual chance is small that people get robbed is less important. Guards and people cleaning the street can improve the perception of safety and cleanliness.

The most important factors will remain to be sun, beaches, tropical environment, nice hotels and good food. The buying decision is dependent on offerings which aren't a common good in the Caribbean. Exclusive offering of valued activities can also decrease the impact of low rated aspects (e.g. beaches). They become relatively less important and in relation with their importance their quality will be on a more satisfying level.

For the visitor, the most important buying decision will be the product and the service to the visitor, product availability and atmosphere. For the intermediary (wholesaler, retailer) image and sales persuasion, which are dependent on product and product availability will be most important. Especially the image that Curaçao has in the eyes of travel agents or intermediaries is not very high and awareness among potential visitors is low despite all promotion effort. Besides measures to improve visitors' satisfaction and awareness of potential visitors, measures have to be taken to improve the image of Curaçao which will facilitate the sale of packages to travel agents and their efforts to sell the package to the customer.

Since the development of a touristic product to a higher quality level is not achieved in one year, the price policy should be in congruence with the increase of quality. A price increase must be associated with a significant improvement of quality perception.

7.1.2. INTERVIEWS WITH TOURIST AUTHORITIES

Besides the questionnaires, also people were interviewed who are closely related with tourism on Curaçao. Their opinions and views are helpful to get a image of the current situation and to prepare recommendations. Below, the most important parts of the interviews are summarized. The interviews were held with people from the Tourist Bureau (TB), Curaçao Action Group (CAG) and the consultant of the Down Town Management Organisation (DMO).

All groups have frequent contact with each other but also with other organisations not mentioned here. The CAG is, among other things occupied with the execution of the recommendations of the A.D. Little study, the DMO with the revitalization of the inner city and TB with the marketing of the tourist product and service.

The DMO is one of the results of the activities of the CAG. The objective of the DMO is: "to increase traffic and sales to all businesses in the down town area by increasing shopper frequency and average expenditure while at the same time developing a new clientele for down town."

specific objectives are:

- 1) to increase security protection in order to improve the perception of security not being adequate, to clean up the loiterers and to encourage merchants to remove the bars from their store windows.
- 2) to improve the atmosphere and appearance of the down town by cleaning up the streets, adding colour in the form of plants, banners, flags etc. and improving the buildings.
- 3) to assess the parking situation and to come up with possible solutions.
- 4) to develop an active, on going marketing and special events program that will consider both the locals and tourists, in order to create excitement in the down town area.
- 5) to lobby the government for duty free shopping
- 6) to work with merchants on an ongoing basis encouraging them to improve their store fronts, interior design, merchandise mix, presentation and service.
- 7) to work with tour bus operators to get them to bring people to the down town when the stores are open.
- 8) to study the issue of hours and the noon closings.
- 9) to develop an effective forum of communication between the public sector and private sector.
- 10) to constantly monitor the above priorities, changing and adding to them as necessary.

The revitalized process of down town is dependent on the government bringing in more tourists to Curaçao as tourists are the long term primary market for down town.

As stated earlier, the CAG is occupied with the execution of the recommendation of A.D. Little. Especially those areas which are not covered by other organisations (e.g. attending investors). The CAG is not concerned with the marketing of tourism.

Several people stated to have a preference for "highly educated", "high income" tourism but this was more a personal opinion than a matter of policy. The importance of cruise tourism was stressed; especially concerning the revitalization of the inner-city. The opening of the International Trade Centre (ITC) is likely to have influence on this kind of tourism. The pros and cons of holiday and business tourism have to be weighed up and a choice has to be made.

At the time of the interview it wasn't clear who would become responsible for the execution of the Tourism Masterplan presented by Horwath & Horwath. Some remarks concerning the masterplan were given.

- 1) it is not strategic enough
- 2) it doesn't show which market Curaçao has to aim towards
- 3) it doesn't show how this can be done
- 4) the financial part is unclear

The masterplan will have to be executed by the new tourist bureau. Due to changes in the government changes in the tourist bureau would only be delayed.

Competition for the ITC will be severe since in Miami and Puerto Rico the same sort of centres are already established. A problem related to the opening of the ITC is that now no hotel is built at the same time, there is a problem concerning the stay of business people. In the peak season Las Palmas and Caribbean hotel will face overoccupation. The question is whether these hotels are willing to give up capacity, normally used for holiday tourism, in favour of business tourism. If they do then the concentration on resort tourism is terminated and they have made a clear choice. Resort tourism would then become obsolete for these hotels. This doesn't mean that there aren't any possibilities for resort tourism. According to Horwath & Horwath, the island could, be divided into several sectors and developed. The area where a development is likely to activate an increase in the "touristic profit" should receive priority. This means that attention shouldn't be focussed on current hotels around the inner city because resort tourism, the way it is offered now, doesn't meet the real resort tourism standards. The island should be divided, like the tourist population, into segments while the whole island should be promoted as one touristic product. This means that at certain points extra attention has to be given to attractiveness and accessibility from other parts of the island. Resort tourism should be approached in the "classical style" i.e. everything has to be available at the resort place so the visitors don't have to move around. The various kinds of tourism (e.g. educational, dive, business or survival tourism) demand their own specific type of accommodation. Hotels to be built in the future must be designed in a way that suites the specific demands best.

Plans to establish a duty free shopping zone in the inner-city is seen by some as a big mistake. Calculations show that on balance, duty free shopping means a loss due to the increase needed in the average tourists spending i.e. when the total population is also allowed to shop duty free. Development of Curaçao as a buying spot is difficult since cruise ships offer duty free goods and are able to offer goods which are wanted most by the tourists.

7.2. MARKETING MIX

A portfolio could be composed relating to various segments. For example:

- culture/history
- survival
- festival market place
- scuba diving
- business
- shopping
- cruise

The various parts of this portfolio have all different demands and need different marketing. In the strategy culture and history was focussed upon because these segments are likely to have the most potential concerning number of visitors and it offers the opportunity to improve the overall awareness of the very existence of Curaçao. In the following attention will be paid to culture, survival, festival market place and

scuba-diving. Shopping, business and cruise tourism will be discussed furtheron.

7.2.1. PRODUCT POLICY

CULTURE/HISTORY

HOTELS

The presence of landhouses on several parts of the island offers the opportunity to create resort tourism at these landhouses. The landhouse itself could be used to house the reception, restaurant etc.. Around the landhouse rooms or studio rooms could be built designed in the same fashion as the landhouse. This way guests are surrounded directly by an architectural/historical environment. Also a start is made to develop tourism facilities not centered in or around Willemstad.

THE INNERCITY

Development of the innercity should focus on offering the opportunity to stroll around in a cosy, clean and warm atmosphere. For this purpose, the architecture is inevitable. This means that the old buildings should be protected from tumbling down or being substituted by new modern offices. The architecture is one of the islands most valuable assets. City walks guided by a person who likes to do this because of his own enthusiasm for the city, as was done recently by one person, should be encouraged.

Also ideas could be brought up by people to perform some, for tourism interesting, handicraft on the street which makes the tourist stop and look for a while at the craftsman and perhaps buy some of his art. People could be incited in the newspaper to send in ideas.

Especially when a cruiseship is in the harbour the atmosphere can be improved by asking a band to play for a few hours in the city.

According to the recommendations in the DMO report, vividness and atmosphere can be improved by adding more colour in the form of flowers, plants and banners.

Also streetfronts of coffeeshops could be improved and be as attractive as the streetfronts at the seaside of the fort arches which would make them more inviting to sit down, have a drink and watch people strolling by.

In order to let people know where they are, what is available and where, information signs should be placed at "strategic" points.

Apart from what was said in the parallel research¹⁴ about training employees in hotels, the same recommendations could be made for employees in stores. Training on how to approach customers and how to deal with them might improve sales. In a lot of cases this also means that the attitude of store personnel needs to be improved regarding service to customers.

¹⁴ L. Arts; *ibid*

OTHER SIGHTS

In order to make sights more available, signs should be placed all over the island making it easy for visitors to find these places and improving roads should increase the accessibility to these places. Also information about the availability of sights, where to find them and what to expect could be put together in a brochure and presented at visible places in the hotel and city.

The lives and times of some of South America's liberators such as Bolivar, Brion and Priar could be shown. Since it is more difficult to present this life, the Octagon and the area around it with real size puppets, tents etc could shape the environment and tell the story of historical persons important for South America.

To show the African cultural influences, old photos, paintings, explanatory text and goods in which the African identity is present could be exhibited. Videos could be made showing the relationship between African and Curaçaoan dances etc. Also the history of slavery on Curaçao, the rebellion of Tula and his followers can be told as well as the importance of Curaçao and the rest of the Antilles and Aruba for all groups who have occupied it in the past.

The influence of the Portuguese/Jewish community and why they came to Curaçao can be explained and further developed within or near the Synagogue. Conversations with historians can shed more light on this and the former subject.

The ITC site offers the opportunity for a (permanent) exhibition of today's developments on Curaçao and communication and trade in particular. Demonstrations of what is possible today and in the near future can be shown. Many tourists will be business people in their daily life for whom this exhibition could be very interesting.

With these suggestions, a holiday might become a total cultural event. This means that from the moment visitors have landed they will be welcomed and held in a cultural/historical atmosphere. This demands special facilities and treatment from arrival to departure. This will be impossible for the near future but worthwhile planning for the future.

The cultural/historical approach offers the hotels a range of opportunities to develop a vivid night-life. The various cultures which influenced today's Curaçao can create a night-life that is related to the Curaçaoan culture. A hotel can focus on a certain culture for one week, another hotel on another alternating culture etc. Another possibility is that hotels focus on a different culture every day. For example, a typical meal is on the menu for a special price and also the evening program is related to the culture which is in the picture. It is important to realize that tastes are different all over the world and food adored by one is disgusting for another group. Therefore tested culture-related meals, which are rated tasteful by a large group, should be put on the menu only. Small workshops could be created for people to learn certain dances. Regarding the variety of night-life activities, it is important to notice that the average length of stay has to be taken into

account since people won't like to see the same show three times during their stay.

SURVIVAL

The market for holidays in which people can master new challenges by means of surviving is growing. In general these expeditions are held in deserted areas. Although Curaçao is only a small island, the heat, the natural rough setting and the fact that a big part is uninhabited, create opportunities for expeditions on foot including watercrossings, diving, mountain climbing and marches. All together it could be some sort of desert training. Opportunities in this field and market could be studied.

FESTIVAL MARKET PLACE

Some reports suggest that Curaçao should become a festival market place. A varied program is offered through the year and each festival should attract visitors who come specifically for a certain program. For example, the Jewish festival which attracted 200 visitors in 1987 could be elaborated. Other festivities were related to sports (e.g. surfing and triathlon).

The fact that the local market is small increases the risk of a festival since festivities will meet a lot of competition from the continents. Jazz festivals or fashion festivals are also held in the source markets. Organising large scale festivities should be studied carefully. But the carnival, which needs relatively only a small investment, could be promoted effectively.

SCUBA-DIVING

Curaçao offers a wide range of scuba-diving facilities. With the completion of the diving hotel near the seaquarium an important facility has been added to this range and it offers the opportunity to penetrate more aggressively in this market.

The fact that culture and history are emphasized in advertising can facilitate advertising in the diving segment because the primary goal of advertising should, in this phase, be improving awareness. Through advertising in dive magazines, the actual diving segment can be reached, with specific ads, more easily and more effectively.

Certain areas are already protected areas and have become National Underwater Parks. Preservation of the underwater flora and fauna and aggressive advertising might achieve an increase in market share. According to Horwath & Horwath the United Kingdom, West Germany, The Netherlands and Italy as well as Canada and the North East and West Coast of the United States have large diving markets. Since divers spend most of the day in and at the water, they will have different wishes for rooms and will measure hotel quality with their own. This difference has to be taken into account and therefore package prices excluding dive facilities should be lower. Those packages should be sold as much as possible which include the use dive equipment and/or lessons.

All hotels should bring the snorkel facilities to the attention of the visitors. On request, brochures which tell how to snorkel and where the best snorkeling spots are should be provided.

Conclusions and recommendations regarding cruise, shopping and business tourism are presented in 9.2, 9.3, 9.4.

7.2.2. PRICE POLICY

As stated earlier, prices should be increased only when the quality perception increases due to an increase in the number of activities, the way activities are presented, the refurbishing and service in hotels, food preparation and the way it is served in general.

Also package prices and prices paid for meals, activities, transport etc. should be balanced. Satisfaction will be influenced negatively when tourists are lured with relatively low package prices but when once on the island the prices e.g. in restaurants turn out to be almost as high as the daily room price. This imbalance will prevent repeat buying. In general people are prepared to pay higher prices if the quality is perceived to be high.

Price discrimination is common in the tourist business. Two major kinds exist. First, price discrimination between high and low season and second, price discrimination among areas of origin. The former is used primarily to keep the occupancy rates at a level that at least covers the variable costs, make operations break even or bring some profit. Visitors from Europe and South America, who have their vacation and travel mainly during the summer period above the equator, may, with the special off season prices, keep occupancy rates at a satisfying level.

When the latter price discrimination policy is used, one might prevent an imbalance between room prices and other prices by offering a meal plan which clearly shows the benefits for the visitor together with the package. Besides decreasing the imbalance and thereby increasing satisfaction, this creates a more certain, therefore less risky, and probably a higher turnover in restaurants which can decrease the costs for every meal. This way the margins between costs and revenues of food preparation could be maintained or even improved.

These discounts and the relation between package prices and other prices should be studied carefully.

With the improvement of the tourist product and the move to higher spending markets, the South American market will decrease since the number of people who might afford such a holiday is only a small percentage of the total population. When this process starts, the island will primarily be dependent on the European market during the off season. The pricing policy should develop with the same speed as the development of the touristic product.

7.2.3. DISTRIBUTION/SALES FORCE/SALE ADMINISTRATION

The main objective concerning distribution should be an improvement of the island's reputation and the relation with travel agencies. Thus, the exchange between the hotels, the tourist bureau and the travel agencies and between travel agents and (potential) customers is facilitated.

Earlier studies already mentioned that the image of Curaçao in the eyes of travel agents is poor. Because of this image or reputation, travel agents will be less inclined to exert themselves to sell Curaçao to customers.

The new policy (i.e. to move, by improving the touristic product, to more expensive segments) has to be communicated to the travel agencies and

improvements or results should be shown by means of e.g. familiarization trips, brochures etc. By these means the travel agents have to be made enthusiastic (again) about the island and which this increase their efforts to recommend the island.

At the moment, most of the time, the various hotels send people to visit travel agents in order to keep contacts up, sell new packages and hope to motivate the travel agents to sell their package. Selling will increase when commission is high. This selling concept in a market which is becoming more and more competitive can turn itself against the seller. The travel agent will have two basic motivations to recommend a certain package. First, the commission he receives for every package sold and second, the chance that the customer will be highly satisfied in order to create repeat buying for his agency. Therefore increasing the margin for the travel agent is not a guarantee that the package is sold with more effort. With the increase of the islands reputation one may appeal more effectively to the travel agency's second motivation.

A joint offering of packages by more or less similar hotels may strengthen the negotiation position of the hotels. It can also improve the relationship since the travel agent deals only with a few people and therefore he has more time to get to know them better. Joint offering also lowers costs since only one person has to visit the travel agent. Awareness and a good reputation in the eyes of the final customer may achieve that the customer will ask for Curaçao. This may also strengthen the position towards the travel agent. Negotiating can be done with less bargaining.

Joint tourist offices of the leeward islands abroad might increase total volume to this area and can be established in areas where an office for Curaçao only wouldn't be profitable. A presentation as The Dutch Antilles and Aruba offering packages which contains a visit to all six or the three leeward islands might be advantageous for all due to a likely increase of marketshare in the Caribbean. Within the offices autonomy for the various islands can also be realized. These offices might also be helpful concerning close relationships with other travel agencies, promotion campaigns, public relations and research in the source markets.

Poor experiences in previous years demand close monitoring concerning results and effectiveness of the tourist offices. This monitoring is also applicable for the whole sales force and sales administration. The costs of maintaining the sales force and sales administration should be weighed against the revenues. Close administration of the number of packages sold by a travel agent, the number of times a travel agent is called upon and the costs of each call can provide information about the effectiveness of a travel agent and the effectiveness of the person who maintains the relationship with the travel agent. This monitoring is the responsibility of hotels and of the Tourist Bureau in case of a national tourist office abroad.

7.2.4. PROMOTION

The Touche Ross consultants already concluded, and it was endorsed by Horwath & Horwath, that the island shouldn't spend heavy on advertising to promote a poor product. First of all the tourist product should be improved.

Still promotion is an essential part in tourism development. As product, price and distribution development, promotion development should be phased. Every step in product development should be accompanied by a step in the other elements in order to move to the more expensive segment.

Two separate promotion strategies should be developed. One for the intermediaries and one for the (potential) tourists. The difference, among others, between intermediaries and tourists is the fact that the intermediaries already know Curaçao and a lot of (potential) tourists don't. Both groups, though, should be subjected to a campaign that increases awareness.

Curaçao has a rather poor image among travel agencies. This image has to be changed. This is best done by improving the tourist product. But travel agencies must notice that the product has improved otherwise they will keep the image they have. On the other hand an image change is not achieved in a short time. A step-by-step change is likely to be more effective because the image will remain more solid in the travel agent's mind. Therefore an awareness campaign, aimed at travel agencies, in which the tourist authorities commit themselves to improve facilities and the product should be started. Plans to create new facilities, which will be executed in the near future, have to be communicated. This way not only Curaçao gets extra attention but the travel agents will also notice that the authorities are not only willing to improve the tourist product but also actually undertake action. This committance could be strengthened by a letter of intend of e.g. the commissioner of tourism.

Many respondents hadn't heard about Curaçao until only a short period before their decision about their holiday destination. Others had come because other places were totally booked up. The awareness among people that Curaçao is a tropical island in the Caribbean sea is low. Development of a campaign which is totally aimed to increase the number of people who know what Curaçao is deserves priority. Messages presented later will than be noticed earlier and more easily.

The awareness campaigns could form the basis for future campaigns. Follow-up campaigns for intermediaries could contain showing the results of plans to improve the product and presentation of new plans for the future. Showing the results could be supported by familiarization trips. Travel agents can then actually see and experience the improvements. This will make them also understand why prices are rising and what the aim behind it is.

For potential buyers, advertising following the awareness campaign has two major aims. To increase traffic to the island and moving to a higher spending segment. This means that advertising has to be adapted constantly to a new segment. The incremental steps taken in product development and price policy have to be followed by steps in advertising. This means that as the quality of cultural and historical facilities increases and prices get higher, advertising should focus more and more on these

aspects of tourism and has to be placed more and more in an environment which appeals to the targeted segment.

Publicity could be a form of advertising which is free of costs and is important if only because of that. Measures and activities covered by the (international) press and which receive positive publicity are not only important towards the intermediaries or potential visitors but also towards (potential) investors. Creating an atmosphere in which initiatives get a chance, are supported and show that the island is on the move may increase the number of investors who become interested. Therefore a good relationship with the press and making sure that the press is present at main events could be very worthwhile. Publicity and public relations are not a matter of waiting passively. It starts with organising activities in which the press might be interested. Invitations to cover stories and newsletters are other possibilities. A reporter facing his deadline might be hoping for a story to cover.

Below some advertising themes are presented which form an example of how advertising and advertising content transform over the years together with the transformation of product and price. Advertising in written media and radio have to support television advertising. Their theme is directly related to the main theme and reinforces it. This example covers the US and Canadian market and is aimed at potential visitors.

The main characters must be early forty and must have typical faces which are recognized easily. With the change of themes, the "hero" is climbing in his career while the "sucker" makes no progress. At the end of the whole campaign the sucker will still be wearing the same suit, live in the same house, have the same car etc. while the hero is becoming more and more exclusive like the tourist product.

Theme 1: awareness improvement

First voice over: "This is a commercial about Curaçao."

Second voice over: "A commercial about Curawhat?"

First voice over: "About Curaçao."

During these lines the screen is filled with the words Curaçao with on the background a tropical scene.

scene

The "sucker" asks the "hero" where he is going for his holiday. The hero answers that he is going to Curaçao. The sucker asks the hero what and where this Curaçao is. The hero says: "Try and find out yourself what and where Curaçao is." He smiles and continues with his work while the sucker is left behind puzzled.

Theme 2: The current segments

scene

The sucker comes into the hero's office which is modernized and better equipped (computer, telephone, modern furniture etc.). The secretary is leaving while the sucker comes in with an unfolded map and says: "Now I know what and where Curaçao is. It's a tropical island in the Caribbean sea near Venezuela." The hero says: "There, you found it. It is one of a group of islands which form the Netherlands Antilles. Besides their local language they speak Dutch, English and Spanish." The sucker says: "English as well?" Disappointed because he already booked his holiday he says: "I should have asked my travel agent about Curaçao."

Theme 3: Moving to the desired segment

scene 1: The sucker arrives in a small, second hand car. His skin is completely burned by the sun and getting out of the car is quite painful.

scene 2: The hero arrives in a new modern car and he gets out of the car relaxed. His skin has a nice dark tan.

scene 3: The men are talking as the secretary approaches. Astonished and with a kind of mean smile she asks the sucker: "What happened to you." The sucker answers that although the beach was nice and there was plenty of sun, there was nothing else to do. After two days he and his mrs where as red as lobsters. The rest of their holiday they had to spend inside the hotel and they had bored themselves to death. Then, he asks the hero where he has spent his holiday and why he doesn't have a sunburn. The hero answers: "I visited Curaçao and I had been warned not to stay in the sun for hours. We didn't even have the time. There is such a rich offering of culture and history, you never be bored. Yes, they really know how to connect relaxation and activities."

scene 4: Voice over reading the words on the screen: "Curaçao the vivid cultural and historical experience in a tropical setting."

Theme 4: The target segment

scene 1: The sucker visits the hero in his beautiful house with a new car in front of it. The sucker comes in and says: "At last I can see your slides of Curaçao. The hero moves the curtain aside with his remote control and behind it is a screen. The hero shows the cultural and historical aspects of Curaçao and tells about it. He ends the slide-session with the remark: "Harry, one day you will learn that a holiday is not only sun, sea and beaches. One day you will learn that a real holiday is Curaçao."

scene 2: Voice over reading words on the screen: "Curaçao the vivid cultural and historical experience in a tropical setting."

8. SOURCES OF KNOWLEDGE AND ADVERTISING IN MAGAZINES

8.1. sources of knowledge

The influence of promotional activities, in relation to other sources, on respondents' knowledge of Curaçao is shown by the table below. Four sources were distinguished: Social contacts, commercial sources, public

sources and personal experience. The main difference between sources of knowledge is that some sources can be influenced directly whereas others only indirectly.

In first instance, the percentages don't give the effectivity of certain actions. They can merely be used for comparison. All these sources do influence the potential visitor. Whether or not he will come to Curaçao depends on various aspects, the decision variables.

The only direct channel to influence potential visitors are the commercial channels. Number of messages and their content are in the issuer's hand. All the other sources are indirect channels but all can be influenced. Social contacts by making sure that visitors had a marvelous holiday; public sources by making sure that the island gets often in the news positively and personal experience as a result of repeat business.

Table 6 Sources of knowledge about Curaçao for the various continents^{1,2}

	Europe	Canada	USA	South America
social contacts	40.6%	15.7%	31.5%	38.8%
commercial sources	13.1%	42.6%	32.2%	13.8%
public sources	7.4%	9.4%	12.2%	20.0%
personal experience	38.8%	32.6%	24.3%	27.5%

1 When more than one source was named, the sources are assumed to have an equal weight

2 personal experience covered everything that couldn't be put in the other sources e.g. learned about at school, earlier visits, found on the map etc.

SOCIAL CONTACTS

Bearing in mind that 88.2% of the respondents would recommend Curaçao to their friends and relatives and the fact that the percentages range from 15.7% to 40.6%, the importance of this source is obvious. Canada was penetrated only a few years ago. This explains the high percentage of commercial sources. Since relatively only a few Canadians have come to the island word-of-mouth promotion is still on a low level. This result shows also that a new market must be approached with heavy promotion and afterwards, i.e. when visitors of a new market have been to the island, a great deal is taken over by mouth-of-mouth advertising like for instance in the USA and Europe. The high percentage for is also caused by the fact that visitors stayed often with friends and relatives.

COMMERCIAL SOURCES

Effectivity of an add campaign or improvement of the reputation and relation with travel agents can made visible by comparing these percentages with the post campaign percentages. All other influences remaining equal, this percentage should increased after 1 period have. Besides an increase in the amount of visitors, the years after the first period will show a decrease of the percentage of commercial sources and, after 1 period of decrease, an increase of the percentages of the other sources. This is caused by the fact that the number of visitors was increased and therefore social contacts and personal experience will be more often the source of knowledge. As a matter of fact they take over the promotional

effect of an add campaign and reinforces it.

PUBLIC SOURCES

What has been said with regard to commercial sources can be repeated here. Should the entrepreneurs in tourism be able to interest the international press, an increase in this percentage might be observed. Promotion and publicity may initiate traffic. If it is done effectively, i.e. an increase in traffic, social contacts and personal experience will reinforce the publicity and promotional efforts. The increase in traffic causes that more people to promote mouth-to-mouth and they might visit the island again.

PERSONAL EXPERIENCE

This percentage contains all sources which don't belong to the preceding sources. For example, school, earlier visits, etc.. All other influences remaining equal, an increase in the number of facilities and the quality of the tourist product can increase repeat business. The same is true for an increase in cruise tourism. There were respondents who stated that they had been on the island on a cruise before. This experience had made them come back. Hence, an increase of cruise tourism could mean an increase in stay-over tourism.

8.2. advertising in magazines

The percentages found, concerning magazines read by respondents, give an indication of the maximum percentage of potential visitors which can be exposed, at least one time, to advertising in a certain magazine. Assumptions underlying these percentages are:

- If a respondent reads two kinds of magazines it is assumed that he will be exposed twice if the add is printed in both magazines. If they read more than two magazines they will be exposed four times.
- It is assumed that respondents read the magazines every week

Table 7 percentages of potential visitors who will be exposed to a certain add in the various magazines at least 1 time

	Europe	Canada	USA	South America
opinion magazine	39.7%	29.1%	18.6%	27.5%
popular magazine	43.1%	36.7%	37.2%	15.0%
information magazine	51.7%	69.6%	75.8%	60.0%
hobby magazine	12.1%	16.5%	15.8%	25.0%

Table 8 percentages of potential visitors who will be exposed to a certain add in the various magazines at least once in relation with other magazines¹

	Europe	Canada	USA	South America
opinion magazine	27.1%	19.2%	12.6%	21.6%
popular magazine	29.4%	24.2%	25.2%	11.8%
information magazine	35.3%	45.8%	51.4%	47.1%
hobby magazine	8.3%	10.9%	10.7%	19.6%
total	100%	100%	100%	100%

1 These percentages indicate exposure rate in relation with other magazines. This percentage can be used to allocate the budget over the types of magazines.

9. MARKET DATA

The sample consisted of 500 respondents and was almost completely equally distributed over men and women.

73% of the visitors gave holiday as the purpose of visiting Curaçao, 9% named shopping or shopping and pleasure and 18% answered business or business and pleasure. The origin of the respondents interviewed and the actual origin of visitors in 1987 is shown in table 9.

Table 1 Origin of visitors and respondents

	actual percentage of stay-over visitors	percentage of respondents	stay-over respondents
<u>South America</u>			
Argentina	1.2%	2.6%	3.0%
Colombia	3.2%	2.0%	2.3%
Venezuela	12.5%	4.6%	5.2%
Rest South America	5.1%	2.2%	1.9%
	<u>22.0%</u>	<u>11.4%</u>	<u>12.4%</u>
<u>Caribbean Area</u>			
Dominican Republic	11.5%	1.0%	1.1%
Jamaica	15.6%	3.8%	4.3%
Virgin Islands	NA	1.0%	0.0%
Rest Caribbean	15.5%	2.6%	2.7%
	<u>42.6%</u>	<u>8.8%</u>	<u>8.1%</u>
<u>Northern America</u>			
Canada	5.4%	20.0%	19.5%
United States	13.2%	23.2%	21.8%
	<u>18.6%</u>	<u>43.2%</u>	<u>41.3%</u>
<u>Central America</u>	1.3%	1.4%	0.6%
<u>Europe</u>			
Federal Republic of Germany	0.4%	1.6%	1.8%
Netherlands	10.9%	27.8%	31.6%
United Kingdom	0.5%	3.2%	1.4%
Rest Europe	2.1%	1.8%	1.7%
	<u>13.9%</u>	<u>34.4%</u>	<u>36.5%</u>
<u>Rest World</u>	1.6%	0.8%	1.1%
	<u>100.0%</u>	<u>100.0%</u>	<u>100.0%</u>

The research population doesn't fit the total population coming to the island. Several reasons can be found:

- The research was conducted during the holiday season between December and July. This season is characterized by peak periods of Northern American tourism whereas during the summer months there is a peak in Southern American tourism and tourism from the Caribbean area.
- The interviews were held at three specific places:
 - * the hotel beaches
 - * the city centre
 - * the free zone

These spots were chosen because here contacts with respondents could be made most easily. With the exception of the free zone, tourists from Northern America and Europe visited these places more often compared to tourists from South America and the Caribbean area.

- Purpose of the visit determines for a great deal whether certain questions are applicable or not. Shopping tourists didn't seem to have much interest in aspects such as beaches, sights, availability of sports accommodations etc. These questions were much more related to "holiday tourism". As a consequence information from the latter group was more extensive and hence this group became more important.
- Interviews and reports from consultants made clear that the tourism authorities want to move to a more upper class, high spending segment. This segment is likely to be found in Europe and Northern America. Although at the moment the middle class segment is served, information about this segment can help to prepare a policy to move to other segments. In that case, a lower proportion of tourists from South America and the Caribbean Area in the sample is less of an omission.
- A lot of people from the Caribbean area were very reluctant to answer the questions. Especially at the airport. One of the most probable reasons is that, at that time, the police was very active to find people who stayed on the island illegally. Especially people from the Dominican Republic.

Respondents used the following means of transportation:

- | | |
|-----------------|-------|
| - scheduled air | 65.4% |
| - charter air | 21.6% |
| - cruiseship | 11.8% |
| - ferry boat | 0.6% |
| - other | 0.4% |

Holiday tourism, cruise tourism, shopping tourism and business tourism will be discussed in separate chapters as a group and/or area of origin. Cruise tourists only stay one day and have to choose from various touristic options as how to spend their day. For them it is only possible to get a first impression. Although they stay only one day, they are an important group. For instance, some of the stay-over tourists stated that they had learned about Curaçao because they had been to it on a cruise. The impression they gained made them decide to come back for a longer period.

The number of holiday stay-over tourists offered also the opportunity to study, within a certain country, continent or area scores and features of various groups of respondents (high vs low income, old vs young, high educated vs low educated and family vs non-family travellers).

Regarding shopping tourism and business tourism two separate groups were studied. For shopping tourism this was North America vs South America and

the Caribbean area and for business tourism this was North America and Europe vs South America, Central America and the Caribbean area. Cruise tourism was studied as a whole. As a result of the number of respondents, the major part of this thesis is dedicated to holiday stay-over tourism.

9.1 HOLIDAY STAY-OVER TOURISM

In the following the results of "holiday stay-over tourists" of the various chosen areas will be discussed. These areas are divided in four groups:

- Europe
 - Canada
 - United States
 - South America/Caribbean Area/Central America
- Differences between areas will be compared.

9.1.1. EUROPE (holiday stay-over; the number of respondents is 127)

The population coming from Europe consisted of people coming from Austria, Belgium, Switzerland, Denmark, The Federal Republic of Germany, Italy, Sweden, The United Kingdom and the Netherlands. Since the major part came from the Netherlands, this country was compared with the rest of Europe to see if differences existed. 66 out of 82 variables turned out to be **not** significantly different at $P < 0.05$. The Netherlands and the other European countries will be put together as a whole and will be labeled "Europe". The differences between the Netherlands and the rest of Europe were found in the following variables:

- * transportation
- * hotels
- * resort
- * holiday budget
- * the way respondents learned about Curaçao
- * religion
- * advise
- * importance:
 - ** roomservice
 - ** restaurants
 - ** water sports
 - ** other sports
- * quality
 - ** restaurants
 - ** culture
 - ** public transport
 - ** sun
 - ** professionalism hotel personnel

92.1% of the respondents came by scheduled air, 7.1% by charter and 0.8% had their own means of transportation. Since the only direct connection between Europe and Curaçao is possible with KLM and the fact that they only provide scheduled air means that people that came by charter had another port of embarkation than Amsterdam. That is, they made a stop somewhere in North America, South America or the Caribbean. Still it is possible to fly scheduled air without using KLM but it often takes much longer to reach the destination. An other explanation could be that

people don't know exactly whether or not a flight is scheduled or charter and only believe it was charter.

Respondents were distributed over the following age categories:

below 21	5.5%
between 21-40	52.8%
between 41-60	27.6%
older than 60	14.2%

The marital status was distributed as follows:

married	55.1%
single	33.9%
divorced	7.1%
widowed	3.9%

45.7% of the respondents had children and there age was distributed over the following classes:

below 6	10.3%
between 6-15	8.6%
older than 15	70.7%
a combination of 1,2 or 3	10.3%

With these percentages, information is gained about respondents' phase in the life cycle. The phase in the life cycle is made more obvious in the following table.

Table 9.1.1. Respondents phase in the life cycle

	below 21 5.5	between 21-40 52.8	between 41-60 27.6	older than 60 14.2	total 100
marital status					
married	—	46.3 (24.4)	68.6 (18.9)	83.3 (11.8)	(55.1)
unmarried	100 (5.5)	53.8 (28.4)	31.4 (8.7)	16.7 (2.4)	(45.0)
children					
no	100	83.6	14.3	5.6	
yes	—	16.4 (20.7)	85.7 (51.7)	94.4 (27.6)	(100.0)
age children					
below 6	—	41.7 (8.6)	—	6.3 (1.7)	(10.3)
between 6-15	—	16.7 (3.4)	6.7 (3.4)	6.3 (1.7)	(8.6)
older than 15	—	16.7 (3.4)	86.7 (44.8)	81.3 (22.4)	(70.7)
combination	—	25.0 (5.2)	6.7 (3.4)	6.3 (1.7)	(10.3)

The majority of the respondents was in the age category of 21-40. Of the respondents that were younger than 21 years one could say that they don't have any family obligations. They were unmarried and didn't have any children. In the age category between 21-40 the situation is quite

different. Respondents were almost evenly distributed in married and unmarried groups. Only 16.4% had children and in most cases they were younger than 6 years. If this age category is compared with the older age categories, one could say that people who just started a family with children are less inclined to take distant holidays. This is probably because of the expenses associated with starting a family and this is the reason why people between 21-40 with children are less present. The married couples with no children don't have to spend money on children and this leaves a larger budget for more distant holidays. The same situation occurs for older couples. Their children have grown up and less money needs to be spent on them. Another financial advantage associated with this age category is that fewer payments for mortgages need to be done and/or less appliances need to be bought that are necessary in a house or appliances that make life more comfortable.

As a conclusion one can say that at the moment the respondents in the age category between 21-40, whether or not married, with no children is the most important group as to amount in life cycle phase. One ought to take into account, though, that the European holiday season starts in July.

Respondents travelled in the following groups:

alone	20.6%
spouse/partner	50.8%
spouse/children	2.4%
friends	14.3%
spouse/children/friends	1.6%
other	10.3%

The number of relatives travelling with the respondents was distributed as follows:

number of relatives	
0	40.9%
1	51.2%
2	4.7%
3	2.4%
4	0.8%

More than 50% travelled with spouse or partner and compared to the number of relatives almost 87% travelled with only one relative. The conclusion is that of the respondents the majority undertake the journey when they don't have children or when the children are at an age that allows their parents to go on a holiday alone. One could also hypothesi that now children are older, parents don't have to travel with the whole family. The available budget per person is then higher and holiday destinations further from home can be chosen. The duration of the flight and the preparation needed can also be an incentive for families with young children to spend their vacation in Europe.

Respondents can be characterized as experienced travellers. 67% goes on a holiday twice or more than twice every year. 28% goes every year and only 5% goes once every two years or less. These results show that vacation has become an integrated part in people's budget. They don't save several years for one big trip but spend a certain amount on holidays every year. This means that holidays have become a more important part in man's

life. Not so many years ago people went on holiday only once a year or less. The increase in the number of holidays not only shows that the importance of holidays has increased but also that people are in a position to satisfy this want.

Contrary to world wide figures, only 29% of the European respondents was on a package tour. This low figure is influenced by the fact that an important part of the respondents stayed with friends and relatives. Of the respondents that stayed in a hotel, 46% was on a package tour i.e. they booked a flight and a hotel at the same time.

Length of stay was distributed as follows

less than 1 week	15.0%
1-2 weeks	27.6%
2-3 weeks	29.1%
4 weeks or more	28.3%

Length of stay of the European respondents is relatively long (28.3% stayed 4 weeks or more). Length of stay will be related to travelling time i.e. most respondents won't be willing to fly 20 hours or more for 1 week of vacation. Length of stay is also related to resort place. The results show that tourists that stay with friends or relatives or reside somewhere else than in a hotel stay longer than the average hotel guest. The extra money hotel guests have to spend will certainly influence length of stay. The reason why the amount of people that stay with friends or relatives is quite high is that still a lot European Dutch live and work on the island. This amount is much less for other areas.

84.3% of the respondents would recommend the island to friends or relatives

SOCIAL CLASSES

To see if a distinction can be made between social classes, information about work situation, income and education are compared.

69.3% of the respondents was employed or self employed. Those who weren't were:

retired	30.0%
entered early retirement	2.5%
house wife/man	30.0%
student	20.0%
other	17.5%
looking for a job	0.0%

The respondents who don't have a paid job are quite evenly distributed over the various items. None of the respondents was looking for a job. Most respondents that answered the not employed question were below 21 or older than 60 years.

The respondents that were employed or self employed were distributed over the following categories:

commercial service sector	55.2%
non profit service sector	26.4%
industrial sector	17.2%
agricultural sector	0.9%

Respondents are distributed over the following income classes (in guilders):

between 0-30 thousand	29.4%
between 31-50 thousand	29.4%
between 51-70 thousand	15.6%
between 71-90 thousand	7.3%
more than 90 thousand	18.3%

If only income is taken into account, the island the attracts, until now, mainly visitors with low and medium incomes. There was no significant correlation between income and budget. This leads to the conclusion that tourists compare holiday destinations with the budget they are willing to spend. Since one can expect people with higher incomes to be able to spend a higher budget, this will influence their choice of holiday destination and make it different from people with lower incomes. Still a part of the people with high incomes are not willing to spend a large budget. This brings them on the level (concerning the budget) of low and middle incomes and make the same trade off between budget and destination. Since the majority of the respondents are in low and middle income classes, it seems that the respondents with an high income belong to the group that spends relatively a low budget. Still a difference will be made between high and low incomes to see if differences exist in the ratings of touristic aspects.

Respondents had obtained education at the following levels:

elementary/low	6.3%
high school	52.8%
college	24.4%
university	16.5%

There was a positive significant correlation between income and education¹⁵. The preceding shows that the islands attracts primarily social middle class groups.

The budget European visitors were prepared to spend is shown below (in guilders).

less than fl 1000	16.5%
between fl 1000 and fl 3000	45.9%
more than fl 3000	37.6%

To see if differences existed between importance and quality, the touristic aspects were compared with a t-test. First the t-test will be performed for the total European holiday population. Subsequently different income groups, educational levels, ages, and travelling groups are compared.

Table 9.1.2. Comparison between importance and quality for the total European holiday population

	importance	quality	sign
sun	3.50 (1)	3.59 (1)	N.S.
beaches	3.26 (2)	2.75 (9)	<0.001
cleanliness	3.22 (3)	2.02 (21)	<0.001
hotel location	3.09 (4)	2.87 (4)	0.01
complaint processing	3.08 (5)	2.24 (20)	<0.001
tropical environment	3.04 (6)	2.88 (3)	0.022
hotel restaurant	3.00 (7)	2.51 (13)	<0.001
other sights	2.98 (8)	2.78 (7)	0.006
restaurants in general	2.97 (9)	2.65 (11)	<0.001
hotel price	2.82 (10)	2.45 (16)	0.004
Curacaoan culture	2.82 (10)	2.76 (8)	N.S.
infrastructure	2.80 (12)	2.51 (13)	0.002
architecture	2.75 (13)	2.86 (5)	N.S.
public transport	2.72 (14)	2.32 (18)	0.017
availability of watersports	2.68 (15)	2.83 (6)	N.S.
availability of other sports	2.65 (16)	2.28 (19)	0.017
taxies	2.64 (17)	2.56 (12)	N.S.
evening out opportunities	2.64 (17)	2.43 (17)	N.S.
shopping opportunities	3.60 (19)	2.69 (10)	N.S.
roomservice	2.59 (20)	2.89 (2)	N.S.
guided tours	2.00 (21)	2.46 (15)	N.S.

N.S. means that the differences are not statistically significant at $P < 0.05$. Only the importance ratings of respondents that also rated quality were taken into account

The results show that differences are more often statistical significant for aspects that have high importance ratings. For aspects that are less important the differences between importance and quality become less.

¹⁵ When the correlation was computed students were deleted from the computation

This figure shows the ranking of touristic aspects. The stars in the accentuated area¹⁶ represent aspects of which the importance and quality rankings are in congruence. The numbers on the vertical axis correspond with the ranking of importance while the horizontal axis represents the quality ranking. For example, coordinate (14,18) represents public transport. Its importance ranking is 14 and its quality ranking is 18. Efforts need to be made to move those stars which are not in the accentuated field to this field. Those which score the highest on the importance ranking should receive priority.

A remark has to be made about the number of respondents. Some aspects were scored by only a few respondents on quality. These were e.g. room-service, guided tours, complaint processing and availability of other sports. Still almost all respondents had answered the importance part of this question. When only the importance rating of these aspects is viewed the rating turns out to be much lower than the rating of respondents that scored importance and quality. Complaint processing formed an exception.

Importance rating of respondents including respondents who didn't rate quality and excluding respondents who didn't rate quality.

	excluding	including
roomservice	2.59	1.81
guided tours	2.00	1.46
complaint processing	3.08	2.86
availability of other sports	2.65	1.84

For the aspects courtesy, professionalism, correctness and the friendliness of hotel personnel, only a score regarding quality was asked because it was assumed that these aspects would, automatically, be important to visitors.

	quality	N
courtesy	2.96	76
professionalism	2.62	73
correctness	2.95	75
friendliness	3.17	77

There was also an open question in which respondents could give their own remarks. The remark most often made concerned the friendliness of the Curaçaoan people in general (i.e. not in stores or hotels). Many stated that the people had been very helpful and friendly to them. This was the case for all continents. Negative comments concerned most of the time individual problems (e.g. opening hours stores, gasoline supply at the National Park, etc.).

¹⁶ The accented area was defined arbitrarily

INCOME

The t-test was also performed for different classes of tourists. First, differences in income classes will be studied. To see if differences existed in importance and quality ratings between high and low income categories, a t-test was executed for the ratings between gross income categories below 50,000 guilders and more than 70,000 guilders annually. Respondents with an gross income between 50,000 and 70,000 were deleted to make differences more visible. The results show that people that work in commercial service sector have had the most education and have the highest incomes. Most respondents in the low income group were unmarried, divorced or widowed whereas in the high income group most respondents were married and had children. It seems that phase in the life cycle and income are closely related.

83% of the respondents from the high income group stay in a hotel where only 47% of the respondents in the low income group did so. The latter more often stayed with friends and relatives. This last group also stayed significantly longer. 39% stayed more than four weeks whereas of the high income group only 7% stayed this long. Still the budget was significantly higher.

Below the scores on touristic aspects are presented.

table 9.1.3. scores on importance and quality of touristic aspects for high and low income groups

	<u>importance</u>		sign.	<u>quality</u>		sign.
	high income	low income		high income	low income	
roomservice	3.50 (1)	2.31 (20)	.016	3.00 (3)	2.77 (7)	N.S.
sun	3.48 (2)	3.49 (1)	N.S.	3.48 (1)	3.63 (1)	N.S.
beaches	3.26 (3)	3.17 (4)	N.S.	2.48 (16)	2.85 (5)	.048
cleanliness	3.11 (4)	3.24 (2)	N.S.	2.07 (20)	2.05 (21)	N.S.
location	2.96 (5)	3.19 (3)	N.S.	2.74 (6)	2.94 (4)	N.S.
restaurants in general	2.86 (6)	3.04 (8)	N.S.	2.59 (12)	2.71 (10)	N.S.
tropical environment	2.81 (7)	3.05 (7)	.086	2.50 (15)	3.03 (2)	.004
hotel restaurant	2.81 (7)	3.15 (5)	N.S.	2.33 (17)	2.73 (9)	.084
architecture	2.80 (9)	2.71 (15)	N.S.	3.20 (2)	2.79 (6)	.007
taxies	2.76 (10)	2.58 (19)	N.S.	2.71 (8)	2.55 (16)	N.S.
infrastructure	2.72 (11)	2.85 (11)	N.S.	2.64 (10)	2.46 (18)	N.S.
other sights	2.71 (12)	3.04 (8)	.018	2.65 (9)	2.77 (7)	N.S.
complaint processing	2.67 (14)	3.16 (6)	N.S.	2.00 (21)	2.63 (13)	N.S.
Curacaoan culture	2.68 (13)	2.87 (10)	N.S.	2.95 (4)	2.70 (11)	.087
hotel price	2.62 (15)	2.79 (13)	N.S.	2.52 (14)	2.54 (17)	N.S.
availability of other sports	2.56 (16)	2.70 (16)	N.S.	2.33 (17)	2.40 (19)	N.S.
shopping opportunities	2.52 (17)	2.59 (18)	N.S.	2.83 (5)	2.64 (12)	N.S.
evening out opportunities	2.46 (18)	2.65 (17)	N.S.	2.15 (19)	2.60 (14)	.05
availability of watersports	2.45 (19)	2.82 (12)	N.S.	2.73 (7)	3.03 (2)	N.S.
public transport	2.43 (20)	2.74 (14)	N.S.	2.57 (13)	2.23 (20)	N.S.
guided tours	1.80 (21)	2.17 (21)	N.S.	2.60 (11)	2.58 (15)	N.S.

N.S. means not significant at $P < 0.10$

Both income groups are served almost equally well. Still the number of respondents in the high income group have to be taken into account. For example only 4 people of the high income groups scored on quality and importance of roomservice.

The importance rating without taking the quality rating into account, shows that the high score on roomservice is out of proportion. With the comparison this score shouldn't be taken into account. The same is appropriate for scores which also were scored by very few respondents.

The quality scores on courtesy, professionalism, correctness and friendliness were distributed as follows between the two income groups.

	high income	N	low income	N	significance
courtesy	3.00	24	2.90	31	N.S.
professionalism	2.63	24	2.76	29	N.S.
correctness	2.96	25	2.90	29	N.S.
friendliness	2.96	25	2.90	31	N.S.

These scores show that professionalism scores lowest. One of the respondents stated: "They do it wrong with a smile".

AGE

To see if differences existed between age categories, two groups were formed. The first group consisted of respondents below 21 and between 21 and 40 years. The second group consisted of respondents between 41 and 60 and older than 60 years.

Answer to the question if respondents were employed or self employed differed significantly. 82% of the respondents in the low age category group was employed or self employed against 51% in the high age category. Of those who weren't employed, 39% of the respondents in the high age group was housewife/man and 50% was retired. The majority in the low age group were students. Respondents belonging to the low age group were higher educated.

It is obvious that age is related to the phase in the life cycle. This was made clear by the scores on marital status, the percentage that had children and the children's age. 74% of the respondents in the high age category was married and 89% had children of whom 85% was older than 15. In the low age category, 42% was married, 15% of the respondents had children of whom 42% was below 6 and the rest was evenly distributed over the other categories.

The respondents in the high age category have a higher income than the younger respondents. Although both scores are high, 78% in the low age and 93% in the high age, the difference, in the number of people that answered affirmative on the question if they would advice others to visit Curaçao, was significant.

The differences between age categories concerning scores on touristic aspects is shown in the following tables.

table 9.1.4. scores on importance and quality of touristic aspects for high and low age groups

	<u>importance</u>			<u>quality</u>		
	high	sign.		high	sign.	
	age	low		age	low	
	age	age		age	age	
sun	3.52 (1)	3.49 (1)	N.S.	3.58 (1)	3.61 (1)	N.S.
cleanliness	3.27 (2)	3.18 (3)	N.S.	2.06 (21)	1.98 (21)	N.S.
complaint processing	3.25 (3)	3.00 (5)	N.S.	2.08 (20)	2.32 (19)	N.S.
beaches	3.20 (4)	3.30 (2)	N.S.	2.67 (12)	2.80 (5)	N.S.
architecture	3.11 (5)	2.48 (20)	<.001	3.13 (2)	2.66 (8)	.001
tropical environment	3.10 (6)	3.00 (5)	N.S.	2.73 (10)	2.98 (2)	.067
location	3.09 (7)	3.09 (4)	N.S.	2.88 (6)	2.87 (3)	N.S.
other sights	3.08 (8)	2.90 (9)	N.S.	3.00 (3)	2.62 (11)	.009
hotel restaurant	3.04 (9)	2.97 (8)	N.S.	2.42 (17)	2.57 (12)	N.S.
restaurants in general	2.95 (10)	2.98 (7)	N.S.	2.61 (14)	2.67 (7)	N.S.
Curacaoan culture	2.90 (11)	2.77 (13)	N.S.	2.93 (5)	2.63 (9)	.006
infrastructure	2.78 (12)	2.81 (11)	N.S.	2.73 (10)	2.38 (16)	N.S.
roomservice	2.78 (12)	2.50 (19)	N.S.	3.00 (3)	2.78 (6)	N.S.
availability of other sports	2.73 (14)	2.62 (17)	N.S.	2.36 (18)	2.24 (20)	N.S.
public transport	2.71 (15)	2.72 (15)	N.S.	2.19 (19)	2.39 (15)	N.S.
hotel price	2.69 (16)	2.90 (9)	N.S.	2.62 (13)	2.34 (18)	N.S.
shopping opportunities	2.66 (17)	2.55 (18)	N.S.	2.77 (9)	2.63 (9)	N.S.
taxies	2.60 (18)	2.67 (16)	N.S.	2.57 (15)	2.56 (13)	N.S.
availability of watersports	2.54 (19)	2.78 (12)	N.S.	2.88 (6)	2.81 (4)	N.S.
evening out opportunities	2.35 (20)	2.77 (13)	.031	2.48 (16)	2.42 (14)	N.S.
guided tours	2.00 (21)	2.00 (21)	N.S.	2.80 (8)	2.37 (17)	N.S.

N.S. means not significant at $P < 0.10$

The quality scores on courtesy, professionalism, correctness and friendliness were distributed as follows between the two age groups.

	high age	N	low age	N	significance
courtesy	3.19	32	2.80	44	.025
professionalism	2.81	31	2.48	42	.075
correctness	3.13	32	2.81	43	.072
friendliness	3.28	32	3.09	45	N.S.

EDUCATION

The respondents were also distributed in two educational levels. A high degree of education and a low degree of education. The former group consisted of respondents that had attended college or university. The latter group consisted of respondents that had attended no formal education, elementary or high school.

There was a statistical significant difference between educational level and the sector of employment. Relatively respondents with a lower educational level more often worked in the industrial and non profit service sector while respondents with a higher educational level worked more often in the commercial service sector. There was also a positive correlation between education and holiday frequency. Higher educated respondents go more often on holiday than the lower educated respondents.

The results of scores on touristic aspects are presented in the tables below.

table 9.1.5. scores on importance and quality of touristic aspects for high and low educational levels

	<u>importance</u>		<u>sign.</u>	<u>quality</u>		<u>sign.</u>
	<u>high</u> <u>educated</u>	<u>low</u> <u>educated</u>		<u>high</u> <u>educated</u>	<u>low</u> <u>educated</u>	
sun	3.41 (1)	3.57 (1)	N.S.	3.49 (1)	3.66 (1)	N.S.
beaches	3.30 (2)	3.24 (3)	N.S.	2.77 (7)	2.74 (9)	N.S.
cleanliness	3.13 (3)	3.28 (2)	N.S.	2.04 (21)	2.00 (21)	N.S.
location	3.10 (4)	3.09 (5)	N.S.	2.93 (3)	2.83 (6)	N.S.
hotel restaurant	3.09 (5)	2.95 (7)	N.S.	2.32 (16)	2.61 (12)	N.S.
complaint processing	3.05 (6)	3.11 (4)	N.S.	2.21 (20)	2.28 (20)	N.S.
other sights	3.03 (7)	2.95 (7)	N.S.	2.69 (10)	2.84 (4)	N.S.
tropical environment	3.00 (8)	3.07 (6)	N.S.	2.96 (2)	2.83 (6)	N.S.
restaurants in general	3.00 (8)	2.95 (7)	N.S.	2.72 (9)	2.60 (13)	N.S.
Curacaoan culture	2.88 (10)	2.80 (12)	N.S.	2.85 (6)	2.69 (10)	N.S.
infrastructure	2.83 (11)	2.78 (13)	N.S.	2.45 (13)	2.67 (11)	N.S.
hotel price	2.73 (12)	2.88 (10)	N.S.	2.54 (12)	2.39 (17)	N.S.
availability of watersports	2.72 (13)	2.65 (16)	N.S.	2.76 (8)	2.90 (2)	N.S.
architecture	2.71 (14)	2.77 (14)	N.S.	2.90 (4)	2.83 (6)	N.S.
taxis	2.69 (15)	2.60 (19)	N.S.	2.69 (10)	2.48 (15)	N.S.
public transport	2.68 (16)	2.75 (15)	N.S.	2.32 (16)	2.31 (18)	N.S.
shopping opportunities	2.66 (17)	2.55 (20)	N.S.	2.45 (13)	2.87 (3)	0.008
evening out opportunities	2.66 (17)	2.63 (17)	N.S.	2.40 (15)	2.46 (16)	N.S.
roomservice	2.56 (19)	2.61 (18)	N.S.	2.89 (5)	2.84 (4)	N.S.
availability of other sports	2.54 (20)	2.81 (11)	N.S.	2.25 (18)	2.31 (18)	N.S.
guided tours	1.67 (21)	2.20 (21)	N.S.	2.22 (19)	2.60 (13)	N.S.

N.S. means not significant at $P < 0.10$

The quality scores on courtesy, professionalism, correctness and friendliness were distributed as follows between the two education groups.

	high education N		low education N		significance
courtesy	2.90	30	3.00	46	N.S.
professionalism	2.65	31	2.60	42	N.S.
correctness	2.90	31	2.98	44	N.S.
friendliness	3.16	31	3.17	46	N.S.

TRAVELLING GROUP

The last division was made between family and non-family travellers. The group consisted out of respondents that stated that they travelled with spouse or partner, spouse and children, spouse, friends and children and other. The last one was also put into this category because the respondents that answered travelled with at least one relative. The second category consisted of people who travelled alone or with friends.

There was a significant difference between age in relation to the travelling group. 71% of the respondents below 21 years traveled alone. The majority, though, of the non-family travellers was between 21 and 40 years. Most of the respondents that were unmarried, divorced or widowed

travelled alone. Only 7% of the non-family travellers had booked a package tour whereas 42% of the family travellers had booked one. Part of this difference can be explained by the fact that family travellers, more than non-family travellers, stayed in hotels. The non-family travellers belonged to the low income group. Their total budget is lower and they stay longer.

table 9.1.6. scores on importance and quality of touristic aspects for family and non-family travellers

	<u>importance</u>		<u>sign.</u>	<u>quality</u>		<u>sign.</u>
	non family	family		non family	family	
sun	3.51 (1)	3.51 (1)	N.S.	3.65 (1)	3.56 (1)	N.S.
cleanliness	3.26 (2)	3.20 (3)	N.S.	2.00 (21)	2.03 (21)	N.S.
beaches	3.18 (3)	3.31 (2)	N.S.	2.88 (3)	2.68 (11)	N.S.
hotel price	3.15 (4)	2.74 (11)	.063	2.38 (17)	2.45 (16)	N.S.
other sights	3.10 (5)	2.92 (9)	N.S.	2.69 (9)	2.82 (6)	N.S.
Curacaoan culture	3.03 (6)	2.73 (12)	.025	2.88 (3)	2.70 (10)	N.S.
tropical environment	3.00 (7)	3.07 (7)	N.S.	2.87 (5)	2.88 (3)	N.S.
complaint processing	3.00 (7)	3.14 (4)	N.S.	2.13 (20)	2.25 (19)	N.S.
roomservice	3.00 (7)	2.57 (19)	N.S.	2.80 (7)	2.86 (4)	N.S.
location	2.94 (10)	3.13 (5)	N.S.	2.75 (8)	2.90 (2)	N.S.
restaurants in general	2.94 (10)	3.00 (8)	N.S.	2.42 (16)	2.76 (7)	.022
public transport	2.95 (12)	2.61 (17)	N.S.	2.32 (19)	2.32 (17)	N.S.
architecture	2.91 (13)	2.67 (14)	N.S.	2.86 (6)	2.86 (4)	N.S.
infrastructure	2.87 (14)	2.77 (10)	N.S.	2.47 (13)	2.52 (13)	N.S.
hotel restaurant	2.86 (15)	3.08 (6)	N.S.	2.64 (11)	2.46 (15)	N.S.
evening out opportunities	2.82 (16)	2.54 (20)	N.S.	2.68 (10)	2.29 (18)	.021
availability of other sports	2.75 (17)	2.61 (17)	N.S.	2.33 (18)	2.25 (19)	N.S.
availability of watersports	2.67 (18)	2.69 (13)	N.S.	3.00 (2)	2.74 (9)	N.S.
taxis	2.61 (19)	2.65 (15)	N.S.	2.44 (14)	2.60 (12)	N.S.
shopping opportunities	2.51 (20)	2.64 (16)	N.S.	2.59 (12)	2.75 (8)	N.S.
guided tours	1.71 (21)	2.12 (21)	N.S.	2.43 (15)	2.47 (14)	N.S.

N.S. means not significant at $P < 0.10$

The quality scores on courtesy, professionalism, correctness and friendliness were distributed as follows between the two travelling groups.

	non-family	N	family	N	significance
courtesy	3.06	16	2.93	59	N.S.
professionalism	2.73	15	2.58	57	N.S.
correctness	2.87	15	2.96	59	N.S.
friendliness	3.25	16	3.15	60	N.S.

When the touristic aspects were tested (i.e. the importance of a touristic aspect was tested against the quality of that aspect) 12 out of 21 aspects showed significant differences. The results of the tests between various groups (e.g. high income against low income) show often that the differences are not significant. Also the ranking of importance between groups doesn't differ that much. But, the quality ranking between groups differs quite a lot. Also, the order ranking of importance doesn't match

the order ranking of quality. These have to be brought on a more equal level. For instance, cleanliness is in the top 5 importance ranking of every group but rated least in the quality ranking. The rankings also show that most European tourists, whatever kind of division is made, come primarily for sun and beaches in a tropical and clean environment and as far as the hotelguest is concerned a nice location. Sun, location and tropical environment most of time meet the standard requested by the tourist. But, the whole Caribbean is a substitute for the preceding. Especially when visitors expect long white sandy beaches. It is therefore very important to take aspects rated lower in the importance ranking into account.

Of the total European population, 6 of the 21 aspects had higher scores on quality than on importance. But 3 of these 6 aspects (roomservice, shopping opportunities, guided tours, availability of watersports, sun and architecture) are the least important to respondents (5 of the 6 don't appear in the importance top 10). None of these 6 differences were statistically significant. On the other hand, all the differences between importance and quality, where importance scored higher than quality, were significant (with exception of culture, evening out opportunities and taxis). How should the differences be interpreted? The most important differences are the differences which are significant and also show a large discrepancy in ranking between importance and quality. Looking at ranking and score provides the opportunity to measure differences in two ways. A third way to determine the importance of a difference is to look at the ranking of the importance of a certain aspect. Tables containing the importance rating and ranking only are omitted here but can be found in the original thesis.

In case of the European population the following differences are the most important:

- beaches
- cleanliness
- complaint processing
- hotel restaurant
- hotel price

Three and maybe even four (i.e. hotel beaches was most often referred to) are directly related to hotels.

To distinguish visitors in active groups and non active groups and whether or not they show much interest in the host culture and other guests true-false questions were asked about the following subjects:

- do visitors come for their rest
- don't they feel the desire for social contacts
- do they want to learn about the Curaçaoan culture
- do they want many activities to be offered
- do they want to gain a general impression
- do they want to escape the monotony of daily life
- do they think contact with the locals is important
- do they think a holiday ought to be planned carefully
- do they think you can't have the comfort you have at home

High and low income groups differed only significantly in relation with the want to get a general impression. High income groups stated more often that they wanted to get a general impression.

Older respondents feel less need for social contacts than their younger counterparts. The older group more often wanted to get a general impression.

Respondents with a lower educational level go on a holiday to escape the monotony of daily life more often than respondents with a higher educational level.

Family travellers more often stated that a holiday ought to be planned carefully than the non-family travellers.

CANADA (holiday stay-over; The number of respondents is 82).

The Canadian respondents originated from two provinces, Quebec (30%) and Ontario (70%). For the majority, English was the native language. 84% of the respondents came by charter air and 16% by scheduled air. Respondents originating from Europe showed opposite percentages. Because so many respondents came by charter air, tourism from Canada is almost totally season determined. After the high season there aren't any charters that offer a direct flight. The number of visitors drops to only a fraction of the number arriving during the high season.

Respondents were distributed over the following age categories:

below 21 years	1.2%
between 21-40 years	23.5%
between 41-60 years	60.5%
older than 60 years	14.8%

The marital status was distributed as follows:

married	78.0%
single	11.0%
divorced	4.9%
widowed	3.7%
other	2.4%

74% had children and there age was distributed in the following classes:

below 6 years	3.3%
between 6-15 years	6.7%
older than 15	83.3%
a combination of 1,2 or 3	6.7%

Table 9.2.1. Respondents phase in the life cycle

	below 21 1.2	between 21-40 23.5	between 41-60 60.5	older than 60 14.8	total 100
marital status					
married	100 (1.2)	52.6 (12.3)	85.7 (51.9)	91.7 (13.6)	(79.0)
unmarried ¹⁸	— (—)	47.4 (11.0)	14.3 (8.7)	8.3 (1.2)	(21.0)
children					
no	100	68.4	14.3	—	
yes	—	31.6 (10.0)	85.7 (70.0)	100 (20.0)	(100.0)
age children					
below 6	—	33.3 (3.3)	— (—)	— (—)	(3.3)
between 6-15	—	33.3 (3.3)	4.8 (3.3)	— (—)	(6.6)
older than 15	—	16.7 (1.7)	88.1 (61.7)	100 (20.0)	(83.4)
combination	—	16.7 (1.7)	7.1 (5.0)	— (—)	(6.7)

¹⁸ Unmarried in this table includes respondents who are divorced or who are widowed

The Canadian population is in another phase in the life cycle than the European respondents. The majority of the European population was between 21-40 years and had no children. More than 75% of the Canadian population was older than 41 years and 83.4% of the respondents' children were older than 15. For the great majority of Canadian respondents, who are in an advanced phase in the life cycle, the same can be said as for the older European respondents. Many of the respondents' children will be independent from their parents whereas those who aren't don't spend their holidays with their parents. This leaves a larger budget for the parents and hence more distant places can be visited. Also expenses that have to be made when one starts a family don't have to be made anymore. The preceding is enhanced by the results concerning number of relatives travelling with the respondent and the kind of group by which the respondent is accompanied.

Respondents travelled in the following groups:

alone	2.4%
spouse/partner	53.7%
spouse/children	6.1%
friends	23.2%
spouse/children/friends	3.7%
other	11.0%

Number of relatives travelling with the respondent

0	25.6%
1	61.0%
2	9.8%
3	0.0%
4	3.7%

The Canadian respondents can be characterized as experienced travellers. 64.6% goes twice or more than twice a year on a holiday. 28.1% goes once every year and only 7.3% goes less than once a year. Also for the Canadian population vacation has become an important part of life and they are also able and willing to pay for quite expensive holidays. Many Canadians stated that they go to the Caribbean area to escape the cold winter for one or two weeks. For many, this is one of the most important motivations to travel.

The Canadian population was very homogeneous regarding length of stay which was distributed as follows:

Length of stay

less than 1 week	0.0%
1-2 weeks	89.0%
2-3 weeks	8.5%
4 weeks or more	2.4%

With 71%, the Canadian population represented much more the world wide percentage that travels on a package tour. The same kind of package was sold to almost all tourists. 89% of the visitors stayed one to two weeks and 98% stayed in a hotel.

91.5% of the respondents would recommend the island to friends or relatives

SOCIAL CLASSES

To see if various social classes can be distinguished, information about work situation, income and education are put together.

86.6% of the respondents were employed or self employed. The 13.6% that wasn't could be distributed in the following categories

retired	50.0%
entered early retirement	21.4%
house wife/man	14.3%
student	7.1%
other	7.1%
looking for a job	0.0%

The respondents who are not employed were retired most of the time. Respondents that were employed or self employed were distributed over the following categories:

commercial service sector	44.3%
industrial sector	28.6%
non-profit service sector	22.9%
agricultural sector	4.3%

Again the majority, though less compared to the European population, was employed in the commercial service sector.

Respondents were distributed over the following income classes (in Canadian dollars):

between 0-30 thousand	18.4%
between 31-50 thousand	31.4%
between 51-70 thousand	24.4%
between 71-90 thousand	7.3%
more than 90 thousand	12.2%

When income classes of different continents or countries are compared, it is assumed that the purchasing power of the Canadian dollar in Canada is equal to the purchasing power of a guilder in the Netherlands or a U.S. dollar in the United States. When viewed this way, Canadians earn more than the European visitors. The most likely reason can be found in the percentage of students coming from Europe to Curaçao whereas only a few of the Canadian respondents stated that they were student.

When only income is viewed, Curaçao doesn't especially attract visitors with high incomes but merely the medium incomes.

Respondents had obtained quite a high degree of education. The percentages were distributed as follows:

elementary	4.9%
high school	32.9%
college	30.5%
university	31.7%

To summarize the preceding, one can say that the island attracts mainly older high educated respondents with medium incomes.

The budget the visitors were prepared to spend is shown below (in Canadian dollars).

less than \$1000	27.0%
between \$1000 and \$3000	62.2%
more than \$3000	10.8%

Although percentually the budget of European visitors is higher, exchange rates have to be taken into account as well as the length of stay, the number of relatives travelling with the respondent and resort place. The amount of money spend will then more or less be equal but the time in which it is spend is much shorter for the Canadians than for the Europeans. This makes the Canadian segment more attractive. Still the main reason for this discrepancy is probably that many Dutch visitors stayed with friends or relatives. This means that less money has to be spend on accommodations by the government for the latter group. In other words, money spent by visitors who stay with friends and relatives doesn't require high investments in hotels and other facilities. Risk will thereby decrease. For visitors staying in hotels, large investments have to be made first which increases risk. As a conclusion it can be said that one mustn't look at the spending figures only but also at the expenses (or investments) that are necessary in order to achieve spending and the risk associated with the investments to obtain a certain budget spending.

Also for the Canadian segment a comparison was made between the perception of importance and quality of touristic aspects. Again, a distinction was made between income categories, educational levels, age categories and travelling groups.

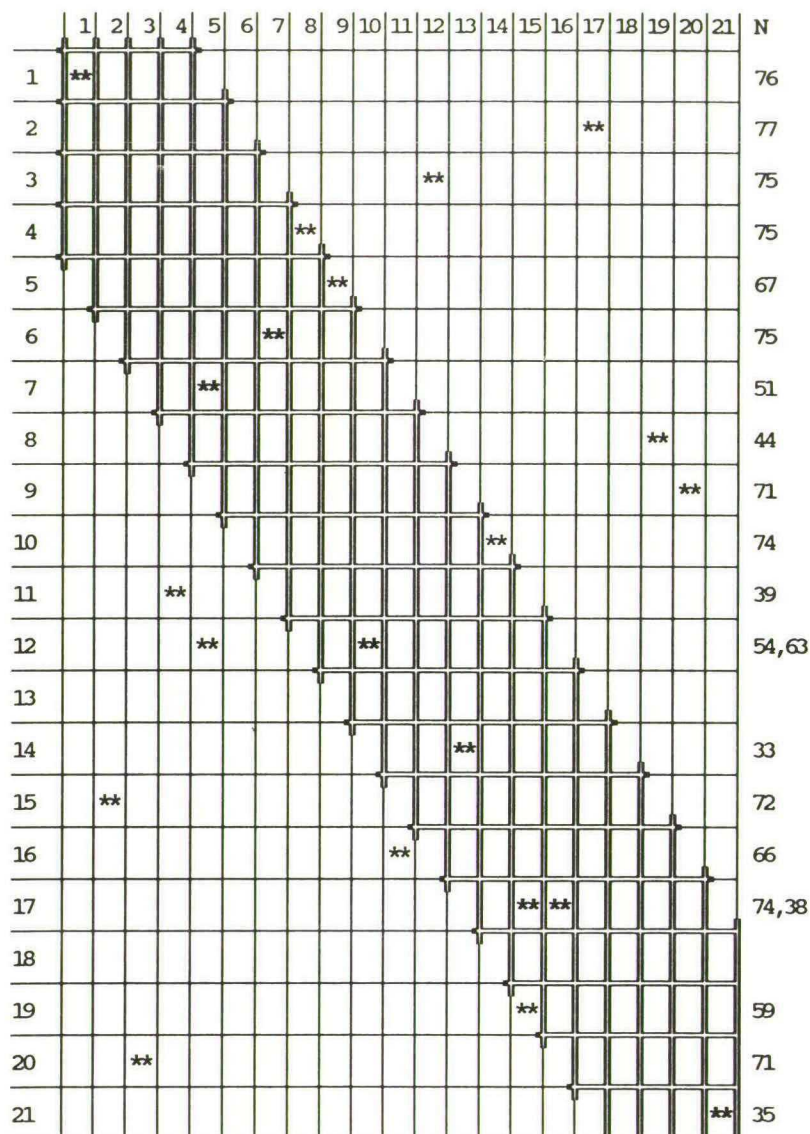
Table 9.2.2. Comparison between importance and quality for the total Canadian holiday population

	importance	quality	sign
sun	3.67 (1)	3.67 (1)	N.S.
beaches	3.53 (2)	2.67 (17)	<0.001
cleanliness	3.43 (3)	2.84 (12)	<0.001
hotel location	3.39 (4)	2.93 (8)	<0.001
restaurants in general	3.24 (5)	2.91 (9)	0.003
tropical environment	3.15 (6)	2.95 (7)	N.S.
roomservice	3.08 (7)	2.98 (5)	N.S.
complaint processing	3.05 (8)	2.64 (19)	0.043
hotel restaurant	3.03 (9)	2.42 (13)	<0.001
hotel price	2.99 (10)	2.69 (14)	0.012
guided tours	2.92 (11)	3.00 (4)	N.S.
other sights	2.89 (12)	2.90 (10)	N.S.
taxies	2.89 (12)	2.98 (5)	N.S.
public transport	2.88 (14)	2.82 (13)	N.S.
Curacaoan culture	2.79 (15)	3.03 (3)	0.012
architecture	2.78 (16)	3.24 (2)	<0.001
infrastructure	2.77 (17)	2.88 (11)	N.S.
availability of watersports	2.68 (18)	2.66 (18)	N.S.
shopping opportunities	2.68 (18)	2.68 (15)	N.S.
evening out opportunities	2.64 (20)	2.68 (15)	N.S.
availability of other sports	2.34 (21)	2.20 (21)	N.S.

N.S. means that the differences are not statistically significant at $P < 0.05$. Only the importance ratings of respondents that also rated quality were taken into account

The quality scores on courtesy, professionalism, correctness and friendliness were distributed as follows. They are not presented in the figure

	quality	N
courtesy	3.37	76
professionalism	2.96	76
correctness	3.07	76
friendliness	3.46	77



This figure shows the ranking of touristic aspects. The stars in the accentuated area¹⁹ represent aspects of which the importance and quality rankings are in congruence. The numbers on the vertical axis corresponds with the ranking of importance while the horizontal axis represents the quality ranking. For example, coordinate (14,13) represents public transport. Its importance ranking is 14 and

¹⁹ The accentuated area was defined arbitrarily

its quality ranking is 13. Efforts need to be made to move those stars which are not in the accentuated field to this field. Those which score the highest on the importance ranking should receive priority.

INCOME

The budget of respondents with higher incomes was significantly higher than the budgets of respondents with lower incomes. This was the only difference between respondents with a high and respondents with a low income, that was statistically significant.

table 9.2.3. scores on importance and quality of touristic aspects for high and low income groups

	<u>importance</u>		sign.	<u>quality</u>		sign.
	high income	low income		high income	low income	
sun	3.64 (1)	3.76 (1)	N.S.	3.71 (1)	3.67 (1)	N.S.
beaches	3.57 (2)	3.53 (2)	N.S.	2.72 (14)	2.57 (20)	N.S.
location	3.57 (2)	3.35 (4)	N.S.	3.00 (5)	3.00 (6)	N.S.
cleanliness	3.43 (4)	3.43 (3)	N.S.	2.93 (10)	2.84 (11)	N.S.
complaint processing	3.43 (4)	2.86 (12)	.052	2.57 (18)	2.77 (14)	N.S.
roomservice	3.38 (6)	3.08 (8)	N.S.	3.00 (5)	3.08 (5)	N.S.
restaurants in general	3.38 (6)	3.18 (6)	N.S.	2.62 (17)	2.91 (9)	N.S.
availability of watersports	3.33 (8)	2.57 (20)	.020	3.00 (5)	2.71 (16)	N.S.
guided tours	3.20 (9)	2.85 (13)	N.S.	2.40 (19)	3.20 (3)	N.S.
architecture	2.08 (10)	2.68 (18)	N.S.	3.31 (3)	3.26 (2)	N.S.
tropical environment	3.00 (11)	3.24 (5)	N.S.	3.00 (5)	3.00 (6)	N.S.
taxis	3.00 (11)	2.76 (15)	N.S.	3.10 (4)	2.92 (8)	N.S.
public transport	3.00 (11)	2.91 (11)	N.S.	3.33 (2)	2.79 (13)	N.S.
hotel restaurant	2.92 (14)	3.06 (9)	N.S.	2.31 (20)	2.62 (19)	N.S.
shopping opportunities	2.92 (14)	2.69 (17)	N.S.	2.69 (15)	2.72 (15)	N.S.
other sights	2.91 (16)	3.09 (7)	N.S.	2.82 (12)	2.85 (10)	N.S.
evening out opportunities	2.82 (17)	2.65 (19)	N.S.	2.64 (16)	2.68 (17)	N.S.
Curacaoan culture	2.77 (18)	2.81 (14)	N.S.	2.64 (16)	2.68 (17)	.050
availability of other sports	2.71 (19)	1.93 (21)	.041	2.29 (21)	2.31 (21)	N.S.
hotel price	2.62 (20)	3.00 (10)	N.S.	3.00 (5)	2.68 (17)	N.S.
infrastructure	2.50 (21)	2.75 (16)	N.S.	2.93 (10)	2.84 (11)	N.S.

N.S. means not statistically significant at $P < 0.10$

The quality scores on courtesy, professionalism, correctness and friendliness were distributed as follows between the two income groups.

	high income	N	low income	N	significance
courtesy	3.40	15	3.45	38	N.S.
professionalism	2.87	15	3.11	38	N.S.
correctness	2.93	15	3.18	38	N.S.
friendliness	3.47	15	3.50	38	N.S.

AGE

Respondents were again distributed in two age groups. 75% of the respondents was older than 41 years. Compared with Europe the average age was much higher. Only 44.8% of the European respondents was older than 41 years. All respondents in the low age group were employed or self employed and 82% of the high age group was employed.

Table 9.2.4. scores on importance and quality of touristic aspects for high and low age groups

	<u>importance</u>		sign.	<u>quality</u>		sign.
	high age	low age		high age	low age	
sun	3.64 (1)	3.79 (1)	N.S.	3.63 (1)	3.84 (1)	N.S.
beaches	3.49 (2)	3.68 (2)	N.S.	2.62 (19)	2.84 (10)	N.S.
cleanliness	3.44 (3)	3.42 (3)	N.S.	2.82 (12)	2.79 (12)	N.S.
location	3.41 (4)	3.33 (6)	N.S.	2.91 (9)	3.00 (5)	N.S.
restaurants in general	3.23 (5)	3.28 (7)	N.S.	2.90 (10)	2.89 (8)	N.S.
complaint processing	3.13 (6)	2.83 (15)	N.S.	2.66 (17)	2.58 (17)	N.S.
tropical environment	3.05 (7)	3.42 (3)	.015	2.95 (6)	3.00 (5)	N.S.
roomservice	3.00 (8)	3.40 (5)	.067	3.05 (4)	2.70 (14)	N.S.
hotel restaurant	3.00 (8)	3.17 (8)	N.S.	2.44 (20)	2.33 (21)	N.S.
hotel price	2.93 (10)	3.17 (8)	N.S.	2.65 (18)	2.78 (13)	N.S.
guided tours	2.93 (10)	2.89 (13)	N.S.	2.93 (7)	3.22 (3)	N.S.
other sights	2.91 (12)	2.80 (16)	N.S.	2.79 (13)	3.20 (4)	.029
public transport	2.88 (13)	2.86 (14)	N.S.	2.92 (8)	2.57 (18)	N.S.
Curacaoan culture	2.82 (14)	2.68 (18)	N.S.	3.08 (3)	2.89 (8)	N.S.
architecture	2.81 (15)	2.67 (19)	N.S.	3.19 (2)	3.39 (2)	N.S.
infrastructure	2.80 (16)	2.69 (17)	N.S.	2.90 (10)	2.81 (11)	N.S.
taxis	2.80 (16)	3.15 (10)	.076	3.00 (5)	2.92 (7)	N.S.
shopping opportunities	2.77 (18)	2.35 (21)	.035	2.70 (15)	2.65 (16)	N.S.
evening out opportunities	2.51 (19)	3.00 (11)	.082	2.67 (16)	2.67 (15)	N.S.
avail. of watersports	2.50 (20)	3.00 (11)	.079	2.71 (14)	2.57 (18)	N.S.
avail. of other sports	2.24 (21)	2.60 (20)	N.S.	2.08 (21)	2.50 (20)	N.S.

N.S. means not statistically significant at $P < 0.10$

The quality scores on courtesy, professionalism, correctness and friendliness were distributed as follows between the two age groups.

	high age	N	low age	N	significance
courtesy	3.40	57	3.28	18	N.S.
professionalism	3.05	57	2.67	18	.088
correctness	3.18	57	2.72	18	.076
friendliness	3.50	58	3.33	18	N.S.

EDUCATION

The only difference between higher and lower educated respondents was their origin. Respondents from Ontario had obtained more education than respondents from Quebec.

Table 9.2.5. scores on importance and quality of touristic aspects for high and low educational levels

	<u>importance</u>		<u>sign.</u>	<u>quality</u>		<u>sign.</u>
	high	low		high	low	
	educated	educated		educated	educated	
sun	3.67 (1)	3.68 (1)	N.S.	3.77 (1)	3.52 (1)	N.S.
beaches	3.55 (2)	3.50 (2)	N.S.	2.65 (18)	2.72 (13)	N.S.
location	3.48 (3)	3.22 (5)	N.S.	2.98 (7)	2.85 (10)	N.S.
cleanliness	3.43 (4)	3.42 (3)	N.S.	2.86 (11)	2.78 (11)	N.S.
restaurants in general	3.20 (5)	3.30 (4)	N.S.	2.93 (9)	2.87 (9)	N.S.
tropical environment	3.15 (6)	3.15 (8)	N.S.	2.98 (7)	2.93 (7)	N.S.
complaint processing	3.07 (7)	3.00 (10)	N.S.	2.59 (19)	2.71 (14)	N.S.
roomservice	3.03 (8)	3.17 (6)	N.S.	2.82 (12)	3.28 (2)	.026
hotel price	2.98 (9)	3.00 (10)	N.S.	2.81 (13)	2.48 (19)	N.S.
hotel restaurant	2.96 (10)	3.16 (7)	N.S.	2.46 (20)	2.36 (20)	N.S.
taxies	2.92 (11)	2.83 (15)	N.S.	3.00 (4)	2.95 (6)	N.S.
guided tours	2.91 (12)	2.94 (12)	N.S.	3.09 (3)	2.88 (8)	N.S.
other sights	2.89 (13)	2.88 (13)	N.S.	3.00 (4)	2.73 (12)	N.S.
architecture	2.78 (14)	2.77 (17)	N.S.	3.24 (2)	3.22 (3)	N.S.
infrastructure	2.78 (14)	2.77 (17)	N.S.	3.00 (4)	2.70 (15)	.076
public transport	2.76 (16)	3.08 (9)	N.S.	2.67 (16)	3.15 (5)	.097
Curacaoan culture	2.75 (17)	2.85 (14)	N.S.	2.93 (9)	3.19 (4)	N.S.
evening out opportunities	2.73 (18)	2.50 (20)	N.S.	2.67 (16)	2.69 (16)	N.S.
availability of watersports	2.68 (19)	2.70 (19)	N.S.	2.71 (14)	2.50 (18)	N.S.
shopping opportunities	2.62 (20)	2.78 (16)	N.S.	2.70 (15)	2.63 (17)	N.S.
availability of other sports	2.36 (21)	2.30 (21)	N.S.	2.24 (21)	2.09 (21)	N.S.

N.S. means not statistically significant at $P < .10$

The quality scores on courtesy, professionalism, correctness and friendliness were distributed as follows between the two education groups.

	high education	N	low education	N	significance
courtesy	3.43	49	3.26	27	N.S.
professionalism	2.96	49	2.96	27	N.S.
correctness	3.06	49	3.07	27	N.S.
friendliness	3.51	49	3.36	28	N.S.

TRAVELLING GROUP

The only difference that existed between family and non-family travellers was the size of the budget. It is obvious that family travellers need a larger budget than non-family travellers. This was supported by the results.

Table 9.2.6. scores on importance and quality of touristic aspects for family and non-family travellers

	<u>importance</u>		sign.	<u>quality</u>		sign.
	non	family		non	family	
sun	3.67 (1)	3.68 (1)	N.S.	3.70 (1)	3.60 (1)	N.S.
beaches	3.56 (2)	3.45 (2)	N.S.	2.67 (16)	2.71 (17)	N.S.
cleanliness	3.47 (3)	3.30 (4)	N.S.	2.82 (11)	2.86 (12)	N.S.
location	3.42 (4)	3.30 (4)	N.S.	2.95 (7)	2.90 (11)	N.S.
restaurants in general	3.22 (5)	3.31 (3)	N.S.	2.88 (9)	3.00 (7)	N.S.
tropical environment	3.13 (6)	3.21 (6)	N.S.	2.82 (11)	3.35 (2)	.010
roomservice	3.08 (7)	3.09 (8)	N.S.	3.03 (3)	2.82 (14)	N.S.
hotel restaurant	3.08 (7)	3.18 (7)	N.S.	2.33 (20)	2.71 (17)	.071
complaint processing	3.07 (9)	3.00 (9)	N.S.	2.56 (18)	2.83 (13)	N.S.
hotel price	3.02 (10)	2.90 (10)	N.S.	2.67 (16)	2.75 (16)	N.S.
guided tours	2.96 (11)	2.86 (13)	N.S.	2.96 (6)	3.07 (6)	N.S.
taxis	2.95 (12)	2.69 (18)	N.S.	2.98 (4)	3.00 (7)	N.S.
public transport	2.95 (12)	2.73 (17)	N.S.	2.77 (13)	3.00 (7)	N.S.
other sights	2.91 (14)	2.82 (14)	N.S.	2.85 (10)	3.00 (7)	N.S.
infrastructure	2.88 (15)	2.74 (16)	N.S.	2.92 (8)	2.76 (15)	N.S.
architecture	2.77 (16)	2.79 (15)	N.S.	3.21 (2)	3.30 (3)	N.S.
Curacaoan culture	2.76 (17)	2.88 (12)	.025	2.98 (4)	3.19 (4)	N.S.
evening out opportunities	2.76 (17)	2.29 (20)	.077	2.73 (14)	2.50 (21)	N.S.
availability of watersports	2.72 (19)	2.56 (19)	N.S.	2.51 (19)	3.11 (5)	.077
shopping opportunities	2.60 (20)	2.89 (11)	N.S.	2.69 (15)	2.63 (19)	N.S.
availability of other sports	2.33 (21)	2.38 (21)	N.S.	2.07 (21)	2.56 (20)	N.S.

N.S. means not statistically significant at P<0.10

The quality scores on courtesy, professionalism, correctness and friendliness were distributed as follows between the two travelling groups.

	non family	N	family	N	significance
courtesy	3.38	21	3.36	55	N.S.
professionalism	3.10	21	2.91	55	N.S.
correctness	3.14	21	3.04	55	N.S.
friendliness	3.38	21	3.48	56	N.S.

There weren't many differences in holiday characteristics between the various groups of Canadian respondents. The only difference concerned whether or not a holiday ought to be planned carefully. Respondents in the high income group more often stated that a holiday ought to be planned carefully than respondents in the low income group. Respondents

in the high age group also stated more often that a holiday ought to be planned carefully.

The Canadian population is much more homogeneous than the European population. This homogeneity explains why many differences aren't significant. On the other hand the discrepancy in importance and quality rankings are quite great.

9.1.3. UNITED STATES (holiday stay-over; number of respondents is 70)

68% of the United States' respondents originated from the North Eastern states. 21.4% lives in the state of New York, 18.6% in Pennsylvania and 14.3% in New Jersey. The percentages of respondents originating from other states were below 10%. 18.5% lives in the South Eastern part of the country; 5.8% in the Mid Northern; 1.4% North Western and 5.7% in the South Western part.

80% came by scheduled air versus 20% by charter. Only the Canadian visitors travelled extensively by charter air. It seems that passenger traffic between Curaçao and other countries is intensive enough to maintain scheduled flights and isn't totally dependent on holiday traffic.

Respondents were distributed over the following age categories:

below 21	11.4%
between 21-40	47.1%
between 41-60	34.3%
older than 60	7.1%

The marital status was distributed as follows:

married	62.9%
single	28.6%
divorced	4.3%
other	4.3%

50% of the respondents had children and the childrens age was distributed in the following classes:

below 6	14.3%
between 6-15	5.7%
older than 15	65.7%
a combination	14.3%
1,2 or 3	

The preceding is again put in a scheme in order to be able to distinguish phases in the life cycle.

table 9.3.1. Respondents phase in the life cycle

	below 21 11.4	between 21-40 47.1	between 41-60 34.3	older than 60 7.1	total 100
marital status					
married	12.5 (1.4)	57.6 (27.1)	79.2 (27.1)	100 (7.1)	(62.7)
unmarried ²⁰	87.5(10.0)	42.4 (20.0)	10.8 (7.2)	— (-.-)	(37.2)
children					
no	100	68.8	12.5	20.0	
yes	—	31.2 (28.6)	87.5 (60.0)	80.0 (11.4)	(100)
age children					
below 6	—	50.0 (14.3)	— (—.-)	— (—.-)	(14.3)
between 6-15	—	20.0 (5.7)	— (—.-)	— (—.-)	(5.7)
older than 15	—	10.0 (2.9)	85.7 (51.4)	100 (11.4)	(65.7)
combination	—	20.0 (5.7)	14.3 (8.6)	— (—.-)	(14.3)

The various phases in the life cycle of respondents from the United States was more or less the same as the various phases in the life cycle of the European respondents. The majority of the respondents was in the age category between 21-40. Together with the respondents who are below 21, they form the low age group. This group is characterized by the fact that the majority (100% respectively 68.8%) doesn't have any children. Of the respondents that had children, 50% was in the lowest age category. In the high age group, the majority of the children were older than 15. This was also the case with Europe and Canada. Also the fact that in general the age of respondents' children was above 15. What was said about travelling and the childrens' age in the preceding chapters (i.e. when Europe and Canada were discussed) could be repeated here.

As a conclusion one can say that at the moment, Curaçao attracts relatively young visitors with no children from Europe and the United States and relatively old visitors from Canada with children who are older than 15.

Respondents travelled in the following groups:

alone	5.7%
spouse/partner	42.9%
spouse/children	7.9%
friends	21.4%
spouse/children/friends	8.6%
other	14.3%

²⁰ unmarried contained also respondents who were divorced or widowed

The number of relatives travelling with the respondents was distributed as follows:

number of relatives	
0	27.1%
1	54.3%
2	5.7%
3	2.9%
4	4.3%
other	5.7%

The respondents from the United states can also be characterized as experienced travellers. 72.9% stated that they go on holiday two times or more a year. 24.3% goes once a year and only 2.8% goes once every two years or less.

Respondents length of stay was distributed as follows:

51.4% of the respondents was on a package tour which takes it between the percentages of Canada and Europe. In a conversation with a Canadian and a respondent from the USA, the difference between the packages sold in Canada and the USA became clear. The package sold in Canada was a bit more expensive (about \$50) but for this price, they could stay one week longer. The packages sold in the US most of the time offer a holiday that lasts one week. Also other packages were sold. More often than Canadian respondents, respondents from the US had bought packages which included more than one island. This also explains the difference in length of stay between these two groups of respondents.

length of stay	
less than 1 week	14.3%
1-2 weeks	75.7%
2-3 weeks	4.3%
4 weeks or more	5.7%

91.4% would recommend the island to friends or relatives.

SOCIAL CLASSES

78.6% of the respondents was employed or self employed. Those who weren't, were:

retired	31.3%
house wife/man	25.0%
student	43.8%
looking for a job	0.0%

The percentage of respondents that was retired was almost equal to the European percentage. The same can be said concerning the percentage that stated that they were house wife/man. The percentage of respondents that stated that they were student was 13.8% higher compared to Europe.

Respondents who were employed or self employed, worked in the following sectors:

commercial service sector	70.4%
industrial sector	16.7%
non-profit service sector	13.0%
agricultural sector	0.0%

Respondents are distributed over the following income classes (in US dollars):

between 0-30 thousand	20.0%
between 31-50 thousand	24.6%
between 51-70 thousand	20.0%
between 71-90 thousand	23.1%
more than 90 thousand	12.3%

Compared with Europe and Canada, respondents from the United States have the highest incomes. Also, on Curaçao, they have the most purchasing power.

Respondents had the following holiday budgets:

less than \$1000	41.8%
between \$1000-\$3000	43.3%
more than \$3000	14.9%

When income and budget is taken into account and it is assumed that length of stay is most of the time 1 week²¹ than, The United states is a very promising segment since a relatively large budget is spent in a short time period.

Visitors had obtained the following levels of education:

elementary	2.9%
high school	34.3%
college	27.1%
university	35.7%

The educational level of respondents is quite high. Compared with visitors from Canada, it was more or less on an equal level.

²¹ in 1986 the average length of stay of visitors from the USA was 6 days

To summarize the preceding one could say that the respondents phase in the life-cycle is more heterogeneous compared with Europe and Canada. Further, the island attracts visitors who stay a relatively short time, who are in a high income category (compared with the other countries), who are highly educated and who work primarily in the commercial service sector.

After the results of the whole population, the results of the various groups will be discussed.

Table 9.3.2. Comparison between importance and quality for the total American holiday population

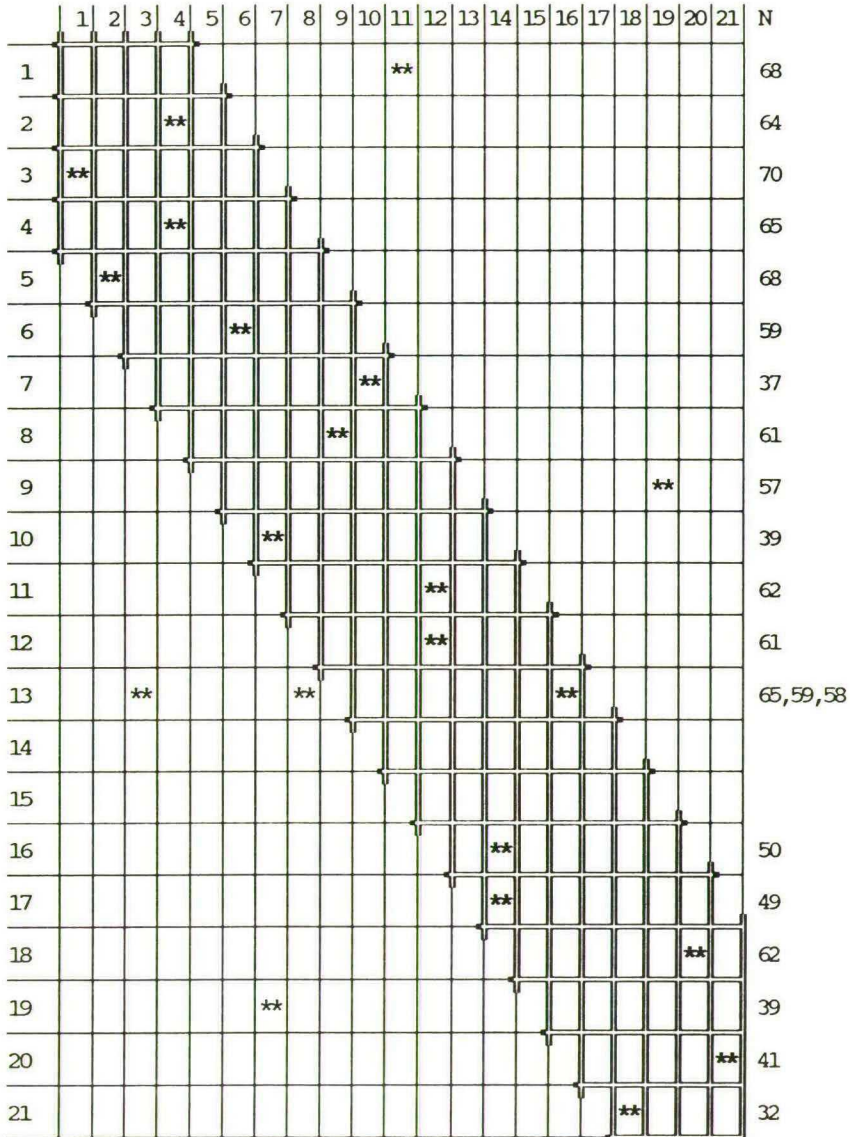
	importance	quality	N	sign
beaches	3.60 (1)	2.94 (11)	68	<0.001
hotel location	3.58 (2)	3.06 (4)	64	<0.001
sun	3.54 (3)	3.59 (1)	70	N.S.
cleanliness	3.52 (4)	3.06 (4)	65	0.001
tropical environment	3.38 (5)	3.19 (2)	68	0.032
restaurants in general	3.34 (6)	3.03 (6)	59	0.001
complaint processing	3.24 (7)	2.95 (10)	37	N.S.
taxies	3.21 (8)	2.96 (9)	61	N.S.
evening out opportunities	3.16 (9)	2.56 (19)	57	<0.001
hotel restaurant	3.13 (10)	2.73 (17)	62	0.014
other sights	2.95 (11)	2.87 (12)	62	N.S.
hotel price	2.90 (12)	2.87 (12)	61	N.S.
architecture	2.83 (13)	3.09 (3)	65	0.023
Curacaoan culture	2.83 (13)	2.98 (8)	59	N.S.
infrastructure	2.83 (13)	2.74 (16)	58	N.S.
availability of watersports	2.82 (16)	2.78 (14)	50	N.S.
public transport	2.80 (17)	2.78 (14)	49	N.S.
shopping opportunities	2.73 (18)	2.52 (20)	62	N.S.
roomservice	2.72 (19)	3.00 (7)	39	N.S.
availability of other sports	2.66 (20)	2.49 (21)	41	N.S.
guided tours	2.63 (21)	2.59 (18)	32	N.S.

N.S. means that the differences are not statistical significant at $P < 0.05$.

Only the importance ratings of respondents that also rated quality were taken into account

The quality scores on courtesy, professionalism, correctness and friendliness were distributed as follows. They are not presented in the figure.

	quality	N
courtesy	3.39	64
professionalism	3.09	64
correctness	3.25	63
friendliness	3.34	64



This figure shows the ranking of touristic aspects. The stars in the accentuated area²² represent aspects of which the importance and quality rankings are in congruence. The numbers on the vertical axis corresponds with the ranking of importance while the horizontal axis represents the quality ranking. For example, coordinate (17,14) represents public transport. Its importance ranking is 17 and

²² The accentuated area was defined arbitrarily

importance ranking is 17 and its quality ranking is 14. Efforts need to be made to move those stars which are not in the accentuated field to this field. Those that score highest on the importance ranking should receive priority.

INCOME

Respondents working in the industrial sector all earned more than 71,000 dollars. In the commercial service sector respondents were more or less distributed over high and low incomes and in most cases, respondents that worked in the non profit sector were in the low income group.

There was a positive correlation between income and the amount of education. Respondents in the low income group more often travelled alone or with friends compared to respondents in the high income group who more often travelled with their family. This crosstabulation also showed that respondents with high incomes more often take their children on the holiday.

There was a positive correlation between income and budget. There was also a significant difference between income groups in relation to religion. 33.3 % of the respondents who stated that their religion was Jewish belonged to the high income group. In relation with the fact that the oldest synagogue of the Western hemisphere is situated on Curaçao this could become an important touristic segment.

table 9.3.3. scores on importance and quality of touristic aspects for high and low income groups

	<u>importance</u>		sign.	<u>quality</u>		sign.
	high income	low income		high income	low income	
beaches	3.48 (1)	3.68 (2)	N.S.	2.96 (7)	3.00 (8)	N.S.
location	3.39 (2)	3.79 (1)	.005	2.87 (11)	3.33 (2)	.036
sun	3.39 (2)	3.62 (4)	N.S.	3.52 (1)	3.76 (1)	N.S.
restaurants in general	3.32 (4)	3.25 (7)	N.S.	3.11 (3)	3.00 (8)	N.S.
cleanliness	3.27 (5)	3.65 (3)	.015	3.09 (4)	3.12 (7)	N.S.
hotel restaurant	3.23 (6)	3.09 (10)	N.S.	2.64 (18)	2.78 (15)	N.S.
tropical environment	3.22 (7)	3.55 (5)	.043	3.17 (2)	3.21 (3)	N.S.
taxies	3.09 (8)	3.19 (8)	N.S.	2.74 (14)	3.19 (4)	.064
complaint processing	3.00 (9)	3.43 (6)	N.S.	3.09 (4)	3.00 (8)	N.S.
evening out opportunities	3.00 (9)	3.14 (9)	N.S.	2.26 (20)	2.68 (18)	.096
Curaçaoan culture	2.90 (11)	2.95 (14)	N.S.	2.90 (10)	3.19 (4)	N.S.
other sights	2.86 (12)	3.04 (11)	N.S.	2.91 (9)	2.87 (13)	N.S.
guided tours	2.78 (13)	2.63 (19)	N.S.	2.78 (13)	2.56 (20)	N.S.
hotel price	2.77 (14)	2.86 (15)	N.S.	2.86 (12)	2.91 (12)	N.S.
availability of other sports	2.73 (15)	2.50 (21)	N.S.	2.36 (19)	2.40 (21)	N.S.
availability of watersports	2.71 (16)	2.81 (17)	N.S.	2.65 (17)	2.86 (14)	N.S.
infrastructure	2.68 (17)	2.82 (16)	N.S.	2.68 (16)	2.68 (18)	N.S.
architecture	2.61 (18)	3.00 (12)	N.S.	3.09 (4)	3.13 (6)	N.S.
shopping opportunities	2.61 (18)	2.55 (20)	N.S.	2.17 (21)	2.73 (17)	.03
roomservice	2.58 (20)	2.67 (18)	N.S.	2.98 (8)	2.93 (11)	N.S.
public transport	2.53 (21)	2.96 (13)	N.S.	2.73 (15)	2.74 (16)	N.S.

N.S. means not statistically significant at $P < 0.10$

The quality scores on courtesy, professionalism, correctness and friendliness were distributed as follows between the two income groups.

	high income	N	low income	N	significance
courtesy	3.48	23	3.42	24	N.S.
professionalism	3.09	23	3.13	24	N.S.
correctness	3.27	22	3.33	24	N.S.
friendliness	3.48	23	3.33	24	N.S.

AGE

Respondents of the high age groups more often travelled with children than respondents of the low age groups who more often travelled alone, with spouse or partners or with friends.

Respondents of the low age group more often booked a package tour, 64.4% versus 34.5%.

All respondents who hadn't financed their trip by their own means belonged to the low age group. The budget of respondents of the high age groups was significantly higher.

table 9.3.4. scores on importance and quality of touristic aspects for high and low age groups

	<u>importance</u>		sign.	<u>quality</u>		sign.
	high	low		high	low	
	age	age		age	age	
location	3.63 (1)	3.54 (3)	N.S.	3.22 (2)	2.95 (7)	N.S.
cleanliness	3.56 (2)	3.50 (4)	N.S.	3.22 (2)	2.95 (7)	N.S.
beaches	3.52 (3)	3.66 (1)	N.S.	2.93 (14)	2.95 (7)	N.S.
sun	3.41 (4)	3.63 (2)	N.S.	3.52 (1)	3.63 (1)	N.S.
complaint processing	3.36 (5)	3.17 (9)	N.S.	3.14 (5)	2.83 (13)	N.S.
tropical environment	3.32 (6)	3.43 (6)	N.S.	3.04 (6)	3.30 (2)	N.S.
hotel restaurant	3.31 (7)	3.00 (11)	N.S.	3.04 (6)	2.50 (21)	.006
restaurants in general	3.16 (8)	3.47 (5)	.055	3.04 (6)	3.03 (3)	N.S.
hotel price	3.04 (9)	2.80 (17)	N.S.	3.04 (6)	2.74 (15)	N.S.
taxies	2.96 (10)	3.40 (7)	.033	3.04 (6)	2.91 (11)	N.S.
shopping opportunities	2.92 (11)	2.58 (21)	.099	2.38 (19)	2.61 (18)	N.S.
evening out opportunities	2.91 (12)	3.32 (8)	.027	2.61 (18)	2.53 (20)	N.S.
Curagacan culture	2.83 (13)	2.83 (16)	N.S.	3.00 (11)	2.97 (6)	N.S.
other sights	2.80 (14)	3.05 (10)	N.S.	2.76 (16)	2.95 (7)	N.S.
availability of watersports	2.69 (15)	2.88 (15)	N.S.	2.75 (17)	2.79 (14)	N.S.
architecture	2.68 (16)	2.95 (12)	N.S.	3.21 (4)	3.00 (4)	N.S.
infrastructure	2.68 (16)	2.94 (13)	N.S.	2.80 (15)	2.70 (16)	N.S.
roomservice	2.67 (18)	2.76 (18)	N.S.	3.00 (11)	3.00 (4)	N.S.
public transport	2.65 (19)	2.89 (14)	N.S.	2.95 (13)	2.66 (17)	N.S.
guided tours	2.54 (20)	2.68 (20)	N.S.	2.23 (21)	2.84 (12)	.068
availability of other sports	2.50 (21)	2.72 (19)	N.S.	2.25 (20)	2.59 (19)	N.S.

N.S. means not statistically significant at $P < 0.10$

The quality scores on courtesy, professionalism, correctness and friendliness were distributed as follows between the two age groups.

	high age	N	low age	N	significance
courtesy	3.67	27	3.19	37	.006
professionalism	3.33	27	2.92	37	.054
correctness	3.52	27	3.06	36	.010
friendliness	3.67	27	3.11	37	.008

EDUCATION

Higher educated respondents stayed on the island for a shorter period than respondents in the lower educated group.

There was a positive correlation between level of education and income.

table 9.3.5. scores on importance and quality of touristic aspects for high and low educational levels

	<u>importance</u>		sign.	<u>quality</u>		sign.
	high	low		high	low	
	educated	educated		educated	educated	
beaches	3.55 (1)	3.71 (4)	N.S.	2.97 (9)	2.88 (10)	N.S.
location	3.49 (2)	3.72 (3)	N.S.	3.03 (6)	3.12 (3)	N.S.
sun	3.43 (3)	3.73 (2)	.048	3.55 (1)	3.65 (1)	N.S.
cleanliness	3.33 (4)	3.87 (1)	<.001	3.17 (3)	2.87 (11)	N.S.
tropical environment	3.28 (5)	3.56 (5)	.062	3.26 (2)	3.08 (5)	N.S.
restaurants in general	3.27 (6)	3.45 (7)	N.S.	3.11 (4)	2.91 (9)	N.S.
complaint processing	3.26 (7)	3.21 (9)	N.S.	3.00 (7)	2.86 (12)	N.S.
hotel restaurant	3.16 (8)	3.08 (12)	N.S.	2.73 (15)	2.72 (20)	N.S.
evening out opportunities	3.08 (9)	3.29 (8)	N.S.	2.44 (20)	2.76 (16)	N.S.
taxies	3.05 (10)	3.48 (6)	.009	2.95 (10)	3.00 (6)	N.S.
other sights	2.95 (11)	2.96 (16)	N.S.	2.95 (10)	2.74 (18)	N.S.
hotel price	2.84 (12)	3.00 (14)	N.S.	2.92 (12)	2.79 (15)	N.S.
architecture	2.79 (13)	2.91 (18)	N.S.	3.10 (5)	3.09 (4)	N.S.
Curacaoan culture	2.76 (14)	2.95 (17)	N.S.	3.00 (7)	2.95 (8)	N.S.
availability of watersports	2.72 (15)	3.00 (14)	N.S.	2.75 (14)	2.83 (14)	N.S.
shopping opportunities	2.67 (16)	2.83 (19)	N.S.	2.38 (21)	2.74 (17)	N.S.
infrastructure	2.63 (17)	3.20 (10)	.003	2.61 (17)	3.00 (6)	.023
availability of other sports	2.60 (18)	2.75 (20)	N.S.	2.60 (18)	2.31 (21)	N.S.
public transport	2.57 (19)	3.16 (11)	.008	2.73 (15)	2.84 (13)	N.S.
guided tours	2.57 (19)	2.73 (21)	N.S.	2.52 (19)	2.73 (19)	N.S.
roomservice	2.45 (21)	3.06 (13)	.006	2.86 (13)	3.18 (2)	N.S.

N.S. means not statistically significant at $P < 0.10$

The quality scores on courtesy, professionalism, correctness and friendliness were distributed as follows between the two educational groups.

	high educated	N	low educated	N	significance
courtesy	3.44	39	3.32	25	N.S.
professionalism	3.18	39	2.96	25	N.S.
correctness	3.26	38	3.24	25	N.S.
friendliness	3.31	39	3.40	25	N.S.

TRAVELLING GROUP

Non family travellers more often came by scheduled air than family travellers. The non-family travellers mostly belonged to the low age groups (i.e. below 41) and if they weren't employed or self employed, they were mostly students. 71.4% of the students travelled alone. The rest that wasn't employed or self employed travelled with family.

Of the respondents that were employed, non-family travellers were to be found in the non-profit and commercial sector. 57.1% of the respondents that worked in the non-profit sector and 26.3% that worked in the commercial sector travelled in non-family groups. Most of the time non-family travellers had no children, whereas 64% of the family travellers had.

In 86.7% of the cases, non-family travellers belonged to the low income group and had in 72.2% of the cases a budget that was below \$1000.- contrary to family travellers of whom only 30.6% had a budget below \$1000.-. Respondents belonging to the Jewish religion travelled with family members in 95.5% of the cases.

table 9.3.6. scores on importance and quality of touristic aspects for family and non-family travellers.

	<u>importance</u>		sign.	<u>quality</u>		sign.
	non	family		non	family	
beaches	3.59 (1)	3.63 (2)	N.S.	2.92 (11)	3.00 (6)	N.S.
location	3.56 (2)	3.63 (2)	N.S.	3.08 (5)	3.00 (6)	N.S.
sun	3.51 (3)	3.63 (2)	N.S.	3.63 (1)	3.47 (1)	N.S.
cleanliness	3.47 (4)	3.69 (1)	N.S.	3.02 (8)	3.19 (2)	N.S.
restaurants in general	3.42 (5)	3.13 (9)	N.S.	3.07 (6)	2.94 (12)	.022
tropical environment	3.34 (6)	3.50 (6)	N.S.	3.28 (2)	3.16 (3)	N.S.
hotel restaurant	3.28 (7)	2.69 (17)	.069	2.76 (15)	2.63 (17)	N.S.
taxies	3.14 (8)	3.39 (7)	N.S.	2.95 (9)	3.00 (6)	N.S.
evening out opportunities	3.10 (9)	3.31 (8)	N.S.	2.56 (19)	2.56 (19)	N.S.
complaint processing	3.08 (10)	3.58 (5)	.016	3.12 (3)	2.58 (18)	N.S.
guided tours	2.95 (11)	2.00 (21)	.007	2.67 (18)	2.45 (21)	N.S.
infrastructure	2.91 (12)	2.57 (20)	N.S.	2.75 (16)	2.71 (15)	N.S.
other sights	2.89 (13)	3.13 (9)	N.S.	2.83 (13)	3.00 (6)	N.S.
hotel price	2.85 (14)	3.07 (11)	N.S.	2.83 (13)	3.00 (6)	N.S.
Curacaoan culture	2.82 (15)	2.87 (15)	N.S.	2.93 (10)	3.13 (4)	N.S.
availability of watersports	2.76 (16)	2.94 (13)	N.S.	2.68 (17)	3.00 (6)	N.S.
shopping opportunities	2.76 (16)	2.63 (19)	N.S.	2.41 (20)	2.81 (14)	.070
architecture	2.74 (18)	3.02 (12)	N.S.	3.09 (4)	3.11 (5)	N.S.
public transport	2.74 (18)	2.93 (14)	N.S.	2.89 (12)	2.50 (20)	N.S.
roomservice	2.71 (20)	2.73 (16)	N.S.	3.04 (7)	2.91 (13)	N.S.
availability of other sports	2.67 (21)	2.64 (18)	N.S.	2.37 (21)	2.71 (15)	N.S.

N.S. means not statistically significant at $P < 0.10$

The quality scores on courtesy, professionalism, correctness and friendliness were distributed as follows between the two travelling groups.

	non-family	N	family	N	significance
courtesy	3.19	16	3.46	48	N.S.
professionalism	2.88	16	3.17	48	N.S.
correctness	3.06	16	3.32	47	N.S.
friendliness	3.19	16	3.40	48	N.S.

Respondents that had obtained a lower degree of education stated more often that they preferred holiday destinations offering a lot of activities.

Family travellers perceived less the need for social contacts and holiday destinations offering a lot of activities than non-family travellers.

Respondents belonging to the low income group preferred also holiday destinations to offer a lot of activities.

9.1.4. SOUTH AMERICA CARIBBEAN AREA AND CENTRAL AMERICA (holiday stay
-over; number of
respondents is 41)

Because the number of respondents interviewed coming from South America, the Caribbean area and Central America is very low, these groups were put together. Still the number of respondents interviewed doesn't allow a segmentation in different groups. This means that only the differences of the whole population will be discussed.

Respondents originated from the following areas:

South America	87.8%
Caribbean area	9.8%
Central America	2.4%

and lived in the following countries: Argentina, Brazil, Columbia, Venezuela, Guyana, Dominican Republic, Netherlands Antilles, Trinidad and Guatemala.

82.9% came by scheduled air, 9.8% by charter air and 7.3% by ferry boat.

Respondents were distributed in the following age groups:

below 21	9.8%
between 21-40	65.9%
between 41-60	19.5%
older than 60	4.9%

Marital status was distributed as follows:

married	63.4%
single	34.1%
divorced	2.4%
widowed	0.0%

48.8% had children and their age was distributed in the following classes:

below 6 years	35.0%
between 6-15 years	25.0%
older than 15 years	30.0%
a combination of 1,2 or 3	10.0%

The preceding can again be combined to obtain a better image of the respondents' phase in the life-cycle.

table 9.4.1. Respondents phase in the life cycle

	below 21 9.8	between 21-40 66.9	between 41-60 19.5	older than 60 4.9	total 100
marital status					
married	25.0 (2.4)	59.3 (39.0)	87.5 (17.1)	100 (4.9)	(63.4)
unmarried ¹	75.0 (7.3)	40.7 (26.8)	12.5 (2.4)	— (—.)	(36.5)
children					
no	75.0	63.0	12.5	—	
yes	25.0 (5.0)	37.0 (50.0)	87.5 (35.0)	100 (10.0)	(100)
age children					
below 6	— (—.)	70.0 (35.0)	— (—.)	— (—.)	(35.0)
between 6-15	100 (5.0)	20.0 (10.0)	28.6 (10.0)	— (—.)	(25.0)
older than 15	— (—.)	10.0 (5.0)	42.9 (15.0)	100 (10.0)	(30.0)
combination	— (—.)	— (—.)	28.6 (10.0)	— (—.)	(10.0)

1 Respondents who were divorced or widowed were also grouped under unmarried

The respondents were relatively young. The majority was between 21-40 years. Within this group, respondents coming from South America (the other two areas are included) had the highest percentages concerning whether the respondent was married and whether the respondents had children compared to the other continents. Nevertheless the differences were only small. Also the younger respondents from South America travel primarily when they don't have children. If they do have children, the childrens' age is quite heterogeneously distributed over the various classes. It is much the same as the division of the North American population. For respondents, coming from countries near Curaçao, it seems less of a problem to travel, with or without children, although they have children below 15 years. The fact that respondents coming from countries near Curaçao travelled more often with more than 1 family member is shown in the table below.

Respondents travelled in the following groups:

alone	4.9%
spouse/partner	47.5%
spouse/children	5.0%
friends	22.5%
other	15.0%

Number of relatives travelling with the respondent:

0	29.3%
1	51.2%
2	12.2%
3	2.4%
4	2.4%
other	2.4%

Compared with the United States the tables look much alike. Compared with Europe and Canada, the percentage of number of relatives is 1 is 10% lower.

Like all groups discussed earlier, the South American respondents also can be characterized as experienced travellers. 62.5% goes on a holiday twice a year or more. 37.5% goes one a year. At first sight, this seems to be an extraordinary result. In countries in Europe and Northern America vacation isn't a privilege anymore for the happy few. Many people go at least once a year²³. This number is much lower for South America. This means that the respondents interviewed belong to the (financially) top layers of their society.

Length of stay was very short in comparison with the other continents.

less than 1 week	63.4%
1-2 weeks	31.7%
2-3 weeks	4.9%

90.2% would recommend friend and relatives to come to the island.

SOCIAL CLASSES

To see if the preceding is true, information about work situation, income and education are put together.

70.7% of the respondents was employed or self employed. The 29.3% who weren't, were distributed in the following categories:

student	45.5%
house wife/man	36.4%
retired	9.1%
looking for a job	9.1%

Respondents that were employed or self employed were distributed over the following sectors:

commercial service sector	56.7%
industrial sector	20.0%
non-profit service sector	16.7%
agricultural sector	6.7%

Again, the majority worked in the commercial service sector. For South America this percentage is quite high. This means probably that within the commercial service sector financial advantages can be obtained over other sectors.

²³ 90% (75% and 16% respectively) of total international tourism originates in Europe and North America

In comparison with the other continents, respondents from South America had obtained the highest degree of education and was distributed as follows:

elementary	2.6%
high school	15.4%
college	12.8%
university	69.2%

This is also an indication that this segment concerns a high social class. Nevertheless, their gross income was far below the gross income of respondents originating from Europe or North America.

Income classes in US dollars:

between 0-30 thousand	67.6%
between 31-50 thousand	11.8%
between 51-70 thousand	5.9%
between 71-90 thousand	8.8%
more than 90 thousand	5.9%

The preceding table shows that the buying power abroad, for respondents from South America, is much lower compared with the other continents.

The budgets, respondents were prepared to spend, were quite high in relation to their length of stay and income.

Budget classes in US dollars

less than \$1000	46.7%
between \$1000 and \$3000	40.0%
more than \$3000	13.3%

To summarize the preceding, one can conclude that respondents are relatively young; they belong to the upper classes of their society and their budget is relatively high in relation with their income and length of stay.

Below only the touristic aspects of the total population will be discussed.

Table 9.4.2. Comparison between importance and quality for the total South American holiday population

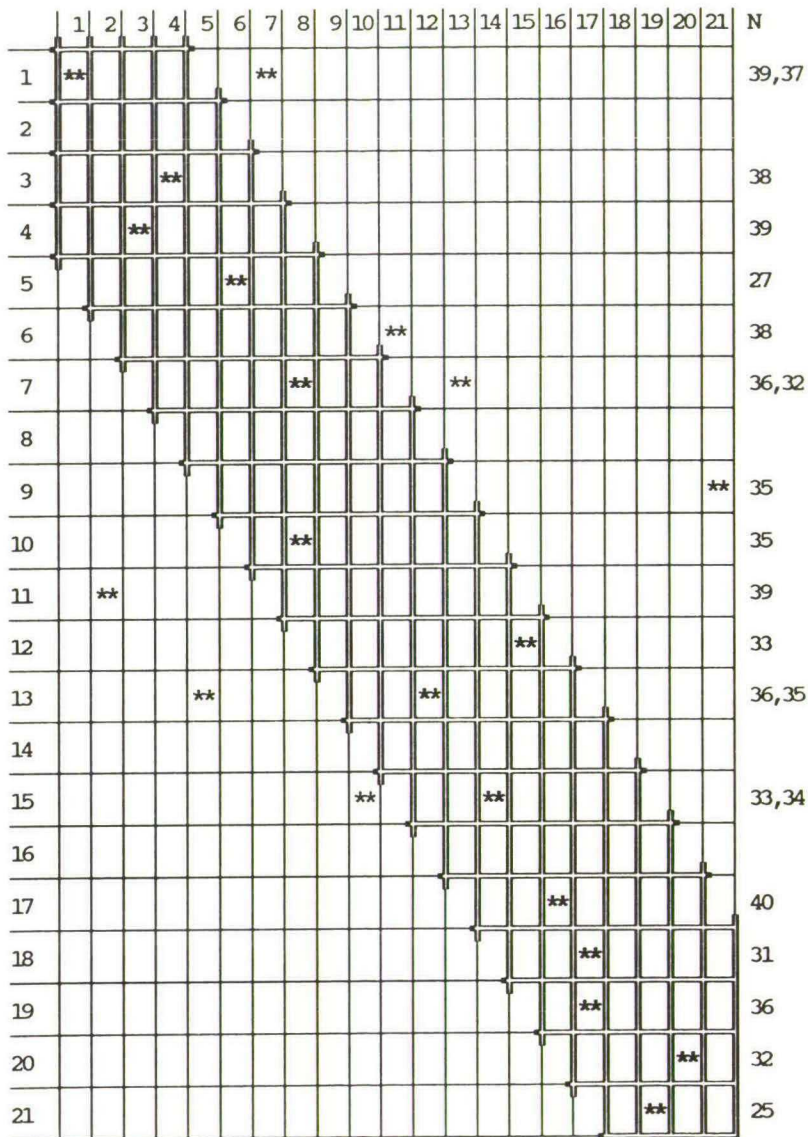
	importance	quality	N	sign
sun	3.59 (1)	3.67 (1)	39	N.S.
beaches	3.59 (1)	2.95 (7)	37	<0.001
cleanliness	3.58 (3)	3.18 (4)	38	0.027
tropical environment	3.51 (4)	3.21 (3)	39	0.021
complaint processing	3.48 (5)	3.00 (6)	27	0.003
infrastructure	3.47 (6)	2.87 (11)	38	<0.001
Curacaoan culture	3.28 (7)	2.94 (8)	36	0.008
public transport	3.28 (7)	2.75 (13)	32	0.007
hotel price	3.26 (9)	2.37 (21)	35	<0.001
roomservice	3.23 (10)	2.94 (8)	35	0.086
architecture	3.21 (11)	3.33 (2)	39	N.S.
taxies	3.18 (12)	2.61 (15)	33	0.001
hotel location	3.14 (13)	3.03 (5)	36	N.S.
hotel restaurant	3.14 (13)	2.77 (12)	35	0.013
restaurants in general	3.14 (13)	2.77 (12)	35	0.013
other sights	2.97 (16)	2.88 (10)	33	N.S.
shopping opportunities	2.80 (17)	2.60 (16)	40	N.S.
availability of watersports	2.68 (18)	2.58 (17)	31	N.S.
evening out opportunities	2.64 (19)	2.58 (17)	36	N.S.
availability of other sports	2.56 (20)	2.41 (20)	32	N.S.
guided tours	2.48 (21)	2.44 (19)	25	N.S.

N.S. means that the differences are not statistically significant at $P < 0.05$.

Only the importance ratings of respondents that also rated quality were taken into account

The quality scores on courtesy, professionalism, correctness and friendliness were distributed as follows. They are not presented in the figure.

	quality	N
courtesy	3.33	36
professionalism	3.09	34
correctness	3.42	36
friendliness	3.33	36



This figure shows the ranking of touristic aspects. The stars in the accentuated area²⁴ represent aspects of which the importance and quality rankings are in congruence. The numbers on the vertical axis correspond with the ranking of importance while the horizontal axis represents the quality ranking. For example, coordinate (7,13) represents public transport. Its importance ranking is 7 and its

²⁴ The accentuated area was defined arbitrarily

quality ranking is 13. Efforts need to be made to move those stars which are not in the accentuated field to this field. Those that score highest on the importance ranking should receive priority.

In order to see if differences exist between types of visitors scores on "mental" holiday aspects (rest to other comfort) are compared for the various continents and countries. The questions were answered with yes or no.

Do visitors come for their rest?

	yes	no		US	CA	EU	SA
USA	90.9%	7.1%	US	----	N.S.	.053	N.S.
Canada	95.1%	4.9%	CA	N.S.	----	.001	N.S.
Europe	77.2%	22.8%	EU	.053	.001	----	.067
South America	90.2%	9.8%	SA	N.S.	N.S.	.067	----

Social contacts are not desired?

	yes	no		US	CA	EU	SA
USA	17.1%	82.9%	US	----	N.S.	N.S.	.076
Canada	22.0%	78.0%	CA	N.S.	----	N.S.	N.S.
Europe	19.7%	80.3%	EU	N.S.	N.S.	----	N.S.
South America	31.7%	68.3%	SA	.076	N.S.	N.S.	----

Do visitors want to learn about Curaçaoan culture?

	yes	no		US	CA	EU	SA
USA	72.9%	27.1%	US	----	N.S.	N.S.	.001
Canada	74.4%	25.6%	CA	N.S.	----	N.S.	.016
Europe	77.2%	22.8%	EU	N.S.	N.S.	----	.030
South America	97.6%	2.4%	SA	.001	.016	.030	----

Do they want many activities to be offered?

	yes	no		US	CA	EU	SA
USA	65.7%	34.3%	US	----	.017	N.S.	N.S.
Canada	46.3%	53.7%	CA	.017	----	.002	.074
Europe	68.5%	31.5%	EU	N.S.	.002	----	N.S.
South America	63.4%	36.6%	SA	N.S.	.074	N.S.	----

Do they want to gain a general impression?

	yes	no		US	CA	EU	SA
USA	97.1%	2.9%	US	----	N.S.	.032	N.S.
Canada	92.7%	7.3%	CA	N.S.	----	N.S.	N.S.
Europe	88.2%	11.8%	EU	.032	N.S.	----	N.S.
South America	95.1%	4.9%	SA	N.S.	N.S.	N.S.	----

Do they want to escape the monotony of daily life?

	yes	no		US	CA	EU	SA
USA	67.1%	32.9%	US	----	.023	.065	N.S.
Canada	48.8%	51.2%	CA	.023	----	N.S.	.005
Europe	49.2%	50.8%	EU	.065	N.S.	----	.017
South America	75.6%	24.4%	SA	N.S.	.005	.017	----

Do they think contact with the locals is important?

	yes	no		US	CA	EU	SA
USA	81.4%	18.6%	US	----	N.S.	N.S.	.013
Canada	73.2%	26.8%	CA	N.S.	----	N.S.	.001
Europe	81.9%	18.1%	EU	N.S.	N.S.	----	.013
South America	97.6%	2.4%	SA	.013	.001	.013	----

Do they think a holiday ought to be planned carefully?

	yes	no		US	CA	EU	SA
USA	60.0%	40.0%	US	----	N.S.	N.S.	N.S.
Canada	54.3%	45.7%	CA	N.S.	----	N.S.	N.S.
Europe	49.6%	50.4%	EU	N.S.	N.S.	----	N.S.
South America	61.0%	39.0%	SA	N.S.	N.S.	N.S.	----

Do they think you can't have the comfort you have at home?

	yes	no		US	CA	EU	SA
USA	50.0%	50.0%	US	----	.048	.036	N.S.
Canada	65.9%	34.1%	CA	.048	----	N.S.	N.S.
Europe	70.9%	21.9%	EU	.036	N.S.	----	N.S.
South America	58.5%	41.5%	SA	N.S.	N.S.	N.S.	----

9.2. CRUISE TOURISM (number of respondents is 59)

Respondents visiting Curaçao on a cruiseship originated from the following countries, areas and continents:

United States	33.9%
Canada	22.0%
Europe	18.6%
Caribbean Area	6.8%
South America	5.1%

Respondents were distributed in the following age categories:

below 21 years	11.9%
between 21-40 years	33.9%
between 41-60 years	30.5%
older than 60 years	23.7%

The marital status was distributed as follows:

married	71.2%
single	20.3%
divorced	5.1%
widowed	3.4%

67.8% of the respondents had children and their age was distributed over the following classes:

below 6 years	10.0%
between 6-15 years	7.5%
older than 15 years	72.5%
a combination of 1,2 or 3	10.0%

With the preceding the following table of respondents phase in the life-cycle was made.

table 9.2.1. Respondents phase in the life cycle

	below 21 11.9	between 21-40 33.9	between 41-60 30.5	older than 60 23.7	total 100
marital status					
married	— (—.)	60.0 (20.3)	100 (30.5)	85.7 (20.3)	(71.2)
unmarried ¹	100 (11.9)	40.0 (13.6)	— (—.)	14.3 (3.4)	(28.8)
children					
no	85.7	42.1	5.9	14.3	
yes	14.3 (2.5)	57.9 (27.5)	94.1 (40.0)	85.7 (30.0)	(100)
age children					
below 6	100 (2.5)	27.3 (7.5)	— (—.)	— (—.)	(10.0)
between 6-15	— (—.)	18.2 (5.0)	6.3 (2.5)	— (—.)	(7.5)
older than 15	— (—.)	18.5 (5.0)	93.7 (37.5)	100 (30.0)	(72.5)
combination	— (—.)	36.5 (10.0)	— (—.)	— (—.)	(10.0)

1 Respondents who were divorced or widowed were also grouped under unmarried

The respondents' life-cycle phases show that the group is quite heterogeneous. Respondents below 21 years are unmarried and don't have children. About half of the number of respondents between 21 and 40 is married and the same percentage has children. The childrens' age is distributed over all categories. Costs associated with having children and the childrens dependency on their parents doesn't seem for these parents to be a reason not to go on a cruise as was seen earlier with the European stay-over tourists. Almost all respondents older than 41 were married and had children older than 15. What was said regarding this group with stay-over tourism can be repeated here. This group has children which are at such an age that they aren't (completely) dependent on their parents anymore and which allows their parents to go on holiday alone. Naturally, it is also a common situation. Older people will have older children.

The visitors travelled in the following groups:

alone	8.5%
spouse/partner	39.0%
spouse/children	3.4%
friends	25.4%
spouse/children/friends	5.1%
other	18.6%

The number of relatives travelling with the respondents was distributed as follows:

number of relatives	
0	32.2%
1	52.5%
2	8.5%
3	6.8%

More than 50.0% travelled with one relative. In most of the cases this was spouse or partner. The rest probably has to be found among people who travelled with spouse/partner and friends and hence are named under other. Quite a large percentage was found among visitors who travelled with friends. These percentages also show that the population coming to Curaçao is quite heterogeneous.

The cruiseship passengers go on a holiday somewhat less frequently than stay-over tourists. Still their travelling experience can be called considerable. 51.7% goes on a holiday twice a year or more. 39.7% goes once a year and 8.6% goes less than once a year.

One can conclude from these percentages and the percentages presented earlier that people who visit Curaçao are frequent travellers. This could also be a reason why they come to Curaçao. In a lot of cases respondents found out about Curaçao themselves while looking for a holiday destination. Since they already have been to other places, this could mean that they are willing to try Curaçao. This will be less the case for cruiseship passengers because Curaçao is only one of the various islands or countries visited. Still, if they knew about Curaçao, cruiseship passengers might especially choose a cruise that visits Curaçao. What they learn about the island in one day could be an incentive to come back for a longer visit. This leaves two options:

- 1) People who know about Curaçao before they book a cruise and are interested. They could decide to take a cruise which contains a visit to Curaçao. The first impression can be of a kind which makes them decide to come back.
- 2) People take a cruise and this way learn about Curaçao. Their impression they might decide to come back.

The difference between the two groups is that the second group skips the try-out phase. A first good impression and a rating of Curaçao higher than other places has the best chance of initiating a repeat visit.

SOCIAL CLASSES

59.3% of the respondents was employed or self employed. Those who weren't were:

retired	54.2%
entered early retirement	4.2%
houseman/wife	25.0%
student	16.7%

The majority of the respondents who didn't have a paid job had retired or entered early retirement. As to the number of respondents, this is quite an important group. They account for 23.8% of all cruiseship passengers interviewed.

The 59.3% found employment in the following sectors:

commercial service sector	58.3%
industrial sector	25.0%
non-profit service sector	16.7%
agricultural sector	0.0%

Respondents were distributed over the following income classes (in US dollars):

between 0-30 thousand	38.8%
between 31-50 thousand	30.6%
between 51-70 thousand	16.3%
between 71-90 thousand	4.1%
more than 90 thousand	10.2%

Respondents who came on a cruise mostly belong to the low income group. The fact that all respondents are put together probably influences these percentages compared to the various groups of stay-over tourists.

Since respondents belong to the low income classes one might suppose that, when there is a positive correlation between income and budget, balancing budget and the number of places visited with this budget could be the reason why respondents have chosen a cruise instead of separate holidays to these destinations. Bearing in mind that holiday frequency is quite high, this might mean that normally destinations are chosen which are nearer home or which are more "certain" to visitors. That is, they know with more certainty what to expect. Second, a cruise still carries the image of something very romantic and exclusive. Something that is a once-in-a-lifetime experience and therefore, by way of exception, a larger budget is spent during the holiday. This might also mean that this image is stronger for people with lower incomes.

Respondents had obtained education at the following levels:

elementary	10.2%
high school	39.0%
college	23.7%
university	27.1%

The respondents were equally distributed over higher and lower educational levels.

Visitors' social class can be summarized as follows: The most important groups are the people who are retired or work in the commercial service sector. The majority belongs to the lower income group and seem to travel on a cruise because of an economical or a romantic or exclusive motive.

Respondents' score on touristic aspects is shown in the tables below. Aspects concerning attributes related to hotels were omitted as not applicable.

Table 9.2.2. Comparison between importance and quality scored by cruiseship passengers.

	importance	quality	N	sign
cleanliness	3.43 (1)	3.29 (2)	51	N.S.
restaurants in general	3.31 (2)	3.00 (6)	13	N.S.
public transport	3.25 (3)	3.00 (6)	12	N.S.
beaches	3.19 (4)	2.95 (10)	21	N.S.
taxies	3.15 (5)	2.95 (10)	20	N.S.
tropical environment	3.14 (6)	3.05 (4)	42	N.S.
sun	3.08 (7)	3.29 (2)	49	N.S.
shopping opportunities	3.07 (8)	3.02 (5)	55	N.S.
evening out opportunities	3.00 (9)	3.00 (6)	10	N.S.
other sights	3.00 (9)	2.94 (13)	31	N.S.
architecture	2.98 (11)	3.31 (1)	51	<0.001
infrastructure	2.89 (12)	2.97 (9)	36	N.S.
Curacaoan culture	2.82 (13)	2.95 (10)	38	N.S.
availability of other sports	2.75 (14)	2.63 (15)	8	N.S.
availability of watersports	2.56 (15)	2.56 (16)	9	N.S.
guided tours	2.36 (16)	2.79 (14)	14	0.028

N.S. means that the differences are not statistically significant at $P < 0.05$.
Only the importance ratings of respondents that also rated quality were taken into account

	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	N
1		**															51
2						**											13
3						**											12
4										**							21
5										**							20
6			**														42
7	**																49
8				**													55
9					**							**					10,31
10																	
11	**																51
12								**									36
13									**								38
14													**				8
15														**			9
16														**			14

Table 9.2.3. importance rating of touristic aspects by cruiseship passengers.

	importance	N
cleanliness	3.47 (1)	55
shopping opportunities	3.09 (2)	57
sun	3.09 (2)	55
tropical environment	3.04 (4)	51
architecture	2.98 (5)	53
other sights	2.87 (6)	47
Curaçaoan culture	2.83 (7)	53
beaches	2.70 (8)	54
infrastructure	2.65 (9)	48
taxies	2.61 (10)	49
restaurants in general	2.49 (11)	49
evening out opportunities	2.26 (12)	43
guided tours	2.23 (13)	52
public transport	2.20 (14)	51
availability of other sports	1.67 (15)	45
availability of watersports	1.57 (16)	47

The importance scores where only a few respondents rated quality distort the importance ranking to a certain extent (e.g. restaurants in general, evening out opportunities, public transport). To the few respondents who rated quality, these aspects were important for the others less so. They didn't have any experience with these aspects either. Therefore the importance ranking without taking quality into account will give a better impression. The quality scores remain important because they show the score of people who have experienced these aspects.

Cruiseship passengers can be characterized as visitors who want to shop in a clean tropical environment and who want to do some sightseeing.

Since shopping is so important to cruiseship passengers, downtown Willemstad should offer products in a way demanded by the tourists. This means that the interior of shops should be designed to suit the customer. Customers are more used to running through clothes rails with shirts on a hanger instead of turning a cardboard box upside down.

Shopping is more than going into a store and buying the good wanted. Shopping in a recreational way also means strolling up and down a street and do some window shopping. Therefore professional display decoration and offering the opportunity for window shopping by removing the bars may increase interest in goods displayed and stimulate buying. Also opening hours need attention. Store owners should be stimulated to keep stores open around noon when a cruiseship is in the harbour.

As a remembrance of the island a lot of people want to buy souvenirs. Originality regarding souvenirs and offering a wide range may not only increase sales but might also become an industry. Positioning Curaçao as a cultural/historical island can provide new ideas for the production and sale of souvenirs.

Attracting more cruise passengers to the island often means more effort to increase the number of calls. This means that good relations with cruise operators are essential. If it is possible to prove that cruise-ship passenger rate Curaçao higher than other islands visited, this might be an important incentive for the cruise operator to increase the number of calls to Curaçao.

Lobbying and negotiating (about water, food and fuel intake) at high levels might also be very fruitful.

Another possible action is building an image among (potential) passengers which makes them decide to go on a cruise which includes Curaçao.

9.3. SHOPPING TOURISM (number of respondents is 36)

Respondents who stated that the purpose of the visit was shopping or shopping and pleasure were distributed into two groups. One group consisted of visitors from North America while the other group contained visitors from South America and the Caribbean area.

30.8% of the visitors from North America came by charter air. 100% of the South American/Caribbean group came by scheduled air.

For 92.3% of the respondents coming from North America shopping was not the only reason for coming to Curaçao. Pleasure was also of great importance. This in contrast to the other group of which only 34.8% mentioned pleasure as a second purpose.

Respondents were distributed over the following age categories:

	NA	SA/CA
below 21 years	0.0%	8.7%
between 21-40 years	76.9%	87.0%
between 41-60 years	15.4%	4.3%
older than 60 years	7.7%	0.0%

The marital status was distributed as follows:

	NA	SA/CA
married	61.5%	56.5%
single	30.8%	43.5%
divorced	7.7%	0.0%
widowed	0.0%	0.0%

46.2% of the respondents coming from North America and 65.2% of the respondents coming from South America or the Caribbean area had children. Their ages were distributed over the following classes:

	NA	SA/CA
below 6 years	16.7%	20.0%
between 6-15 years	33.3%	20.0%
older than 15 years	33.3%	6.7%
a combination of 1,2 or 3	16.7%	53.3%

From the preceding a table of respondents' phase in the life-cycle was made and is shown below.

table 9.3.1. Respondents phase in the life cycle

	below 21 7.9	between 21-40 81.6	between 41-60 7.9	older than 60 2.6	total 100
marital status					
married	33.3 (2.6)	51.6 (42.1)	100 (7.9)	100 (2.6)	(55.2)
unmarried ¹	66.7 (5.3)	48.4 (39.5)	— (—.)	— (—.)	(44.8)
children					
no	100	45.2	—	—	
yes	— (—.)	54.8 (81.0)	100 (14.3)	100 (4.8)	(100)
age children					
below 6	— (—.)	27.8 (22.7)	— (—.)	— (—.)	(22.7)
between 6-15	— (—.)	22.2 (18.2)	33.3 (4.5)	— (—.)	(22.7)
older than 15	— (—.)	— (—.)	66.7 (4.5)	100 (4.5)	(13.6)
combination	— (—.)	50.0 (40.9)	— (—.)	— (—.)	(40.9)

1 Respondents who were divorced or widowed were also grouped under unmarried

Respondents travelled in the following groups:

	NA	SA/CA
alone	23.1%	8.7%
spouse/partner	61.5%	0.0%
spouse/children	7.7%	4.3%
friends	7.7%	73.9%
other	0.0%	13.0%

91.7% of the respondents originating from South America or the Caribbean area didn't travel with any relatives. Of the 8.3% who did the number of relatives were distributed as follows:

number of relatives	NA	SA/CA
0	46.2%	91.7%
1	46.2%	2.8%
2	7.6%	2.8%
other	0.0%	2.8%

The respondents can be labeled as experienced shoppers. 61.6% of the North American group goes on a shopping or shopping and pleasure trip twice a year or more than twice a year and 38.4% goes every year. 56.1% of the South American/Caribbean area group goes on a shopping or shopping and pleasure trip twice or more than twice a year. 19.0% once a year, 4.8% once every two years and 19.0% less than once every two years.

Packages were much more often sold in North America (76.9%) than in South America and the Caribbean area (21.7%). This means that respondents of

the latter group do not book their hotel and flight at the same time. There was also a significant difference in length of stay. 95.7% of the South American/Caribbean group stayed less than a week has during their stay on the island whereas 69.2% of the North American group stayed 1-2 weeks. The former group almost only time for shopping while the latter group has more time available to do other things.

84.6% of the North American group stayed in a hotel and 90.9% of this percentage resorted in one of the A-category hotels. 15.4% stayed at a place other than a hotel e.g. friends and relatives. 65.2% of the South American/Caribbean group stayed in a hotel and 82.4% in one of the C-category hotels. This shows that the latter group is less interested in the luxury of a hotel.

SOCIAL CLASSES

To see if various social classes can be distinguished, information about work situation, income and education are put together.

All of the respondents from North America were employed or self employed and 69.6% of the South American/Caribbean group was employed or self employed. The 30.4% that wasn't was distributed in the following categories:

	SA/CA
student	28.6%
house wife/man	14.3%
looking for a job	14.3%
other	42.9%

Respondents that were employed or self employed were distributed over the following categories:

	NA	SA/CA
commercial service sector	50.0%	93.3%
non-profit service sector	25.0%	6.7%
industrial sector	25.0%	0.0%
agricultural sector	0.0%	0.0%

The majority of the respondents found employment in the commercial service sector. In case of the South American group this is probably trade.

Respondents educational levels.

	NA	SA/CG
elementary	—	22.7%
high school	46.2%	54.5%
college	23.1%	9.1%
university	30.8%	13.6%

Although the differences were not significant, the respondents from North America had received a higher degree of education.

The difference in income (in US dollars) was significant to a high degree and was distributed as follows:

	NA	SA/CG
between 0-30 thousand	33.3%	100%
between 31-50 thousand	33.3%	--
between 51-70 thousand	--	--
between 71-90 thousand	8.3%	--
more than 90 thousand	25.0%	--

Although the incomes were higher, the length of stay longer and the hotels more expensive, the budget of the North American respondents wasn't higher. The budgets were distributed as follows:

	NA	SA/CG
less than \$1000	75.0%	71.4%
between \$1000-\$3000	16.7%	19.0%
more than \$3000	8.3%	9.5%

Apparently the visitor from South America/Caribbean area comes to buy goods which are sold again in the home country. The visitors from North America on the other hand, more often buy goods for personal use. This might be a reason why the South American/Caribbean visitors spent the same amount of money in a much shorter period of time. For them, coming to Curaçao means business.

Scores on touristic aspects are presented below. In certain cases the number of respondents is low because the questions were not applicable to many respondents. Because importance ratings are likely to be different for shopping tourists from North America and South America/Caribbean, both importance and quality scores will be compared separately. The figures show the relationship between importance and quality of each of the two groups.

Table 9.3.2. Comparison between importance and quality scores for the South American and Caribbean shopping tourists (**)

	importance	quality	N	sign
shopping opportunities	3.77 (1)	3.05 (9)	22	0.01
complaint processing	3.40 (2)	3.00 (15)	5	N.S.
infrastructure	3.35 (3)	3.24 (4)	17	N.S.
taxis	3.25 (4)	3.40 (2)	20	N.S.
public transport	3.25 (4)	3.33 (3)	12	N.S.
cleanliness	3.24 (6)	3.10 (7)	21	N.S.
tropical environment	3.13 (7)	3.00 (9)	15	N.S.
architecture	3.08 (8)	3.08 (8)	12	N.S.
hotel price	3.06 (9)	2.56 (17)	18	0.024
beaches	3.00 (10)	3.13 (6)	8	N.S.
roomservice	3.00 (10)	2.33 (21)	6	N.S.
other sights	3.00 (10)	2.91 (13)	11	N.S.
guided tours	3.00 (10)	3.50 (1)	2	N.S.
hotel location	2.88 (14)	3.00 (9)	17	N.S.
sun	2.86 (15)	3.21 (5)	14	N.S.
evening out opportunities	2.82 (16)	2.91 (13)	11	N.S.
restaurants in general	2.70 (17)	2.50 (20)	10	N.S.
Curacaoan culture	2.69 (18)	3.00 (9)	13	N.S.
hotel restaurant	2.60 (19)	2.60 (19)	10	N.S.
availability of watersports	1.67 (20)	2.67 (16)	3	N.S.
availability of other sports	1.00 (21)	2.50 (18)	2	N.S.

N.S. means that the differences are not statistically significant at $P < 0.05$.

The quality scores on courtesy, professionalism, correctness and friendliness were distributed as follows. They are not presented in the figure.

	quality	N
courtesy	3.13	16
professionalism	2.94	16
correctness	2.81	16
friendliness	3.06	16

Table 9.3.3. Comparison between importance and quality scores for the North American shopping tourists (##)

	importance	quality	N	sign
hotel location	3.60 (1)	2.70 (11)	10	0.004
sun	3.50 (2)	3.75 (1)	12	N.S.
beaches	3.50 (2)	2.60 (14)	10	0.019
hotel price	3.44 (4)	2.67 (13)	9	0.008
cleanliness	3.42 (5)	3.42 (2)	12	N.S.
tropical environment	3.42 (5)	3.17 (4)	12	N.S.
restaurants in general	3.25 (7)	2.42 (15)	12	0.002
taxies	3.17 (8)	2.92 (8)	12	N.S.
other sights	3.17 (8)	2.42 (15)	12	0.032
evening out opportunities	3.10 (10)	2.00 (20)	10	0.024
Curacaoan culture	3.08 (11)	2.92 (8)	12	N.S.
roomservice	3.00 (12)	3.17 (4)	6	N.S.
infrastructure	3.00 (12)	3.00 (6)	11	N.S.
hotel restaurant	3.00 (12)	2.33 (17)	9	N.S.
shopping opportunities	2.92 (15)	2.92 (8)	12	N.S.
architecture	2.83 (16)	3.25 (3)	12	0.017
availability of watersports	2.78 (17)	3.00 (6)	9	N.S.
complaint processing	2.67 (18)	2.17 (19)	6	N.S.
guided tours	2.67 (18)	1.83 (21)	6	N.S.
public transport	2.44 (20)	2.33 (17)	9	N.S.
availability of other sports	2.40 (21)	2.70 (11)	10	N.S.

N.S. means that the differences are not statistically significant at $P < 0.05$.

The quality scores on courtesy, professionalism, correctness and friendliness were distributed as follows. They are not presented in the figure.

	quality	N
courtesy	2.73	11
professionalism	2.64	11
correctness	2.73	11
friendliness	3.00	11

	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	N	N
																						*	#
1								**		##												22	10
2	##													##	**							5	12,10
3				**																		17	
4		**	**										##									20,12	9
5		##		##																			12,12
6						**																21	
7								**							##							15	12
8								*#							##							10	12,12
9																**						18	
10	**					**							**						##	**		2,8,11,6	10
11								##															12
12			##		##												##						6,11,9
13																							
14								**														17	
15				**				##														14	12
16		##											**									11	12
17						##													**			10	9
18								**											##	##		13	6,6
19																			**			10	
20															**	##						3	9
21											##							**				2	10

Table 9.3.4. Comparison between importance scores of shopping tourists from North America against shopping tourists from South American and the Caribbean.

	SA/CG	N	NA	N	sign
shopping opportunities	3.77 (1)	22	2.92 (12)	13	0.004
infrastructure	3.35 (2)	17	2.85 (14)	13	0.059
cleanliness	3.23 (3)	22	3.46 (3)	13	N.S.
hotel price	3.06 (4)	18	3.45 (4)	11	0.033
taxies	3.05 (5)	22	3.15 (7)	13	N.S.
complaint processing	2.90 (6)	10	2.64 (16)	11	N.S.
tropical environment	2.88 (7)	17	3.38 (5)	13	N.S.
other sights	2.83 (8)	12	3.08 (9)	13	N.S.
hotel location	2.78 (9)	18	3.55 (1)	11	0.004
architecture	2.73 (10)	15	2.77 (15)	13	N.S.
sun	2.62 (11)	16	3.54 (2)	13	0.005
roomservice	2.40 (12)	10	2.40 (18)	10	N.S.
public transport	2.38 (13)	21	2.50 (17)	12	N.S.
Curaçaoan culture	2.29 (14)	21	3.00 (11)	13	0.026
hotel restaurant	2.19 (15)	16	2.91 (13)	11	0.054
restaurants in general	2.10 (16)	20	3.15 (7)	13	0.002
beaches	2.07 (17)	15	3.25 (6)	12	0.006
evening out opportunities	2.00 (18)	21	3.08 (9)	12	0.003
guided tours	1.40 (19)	15	2.25 (20)	12	0.048
availability of watersports	1.15 (20)	13	2.33 (19)	12	0.004
availability of other sports	1.08 (21)	13	2.17 (21)	12	0.001

N.S. means that the differences are not statistically significant at $P < 0.10$.

The differences between shopping tourists originating from North America and South America/Caribbean area were shown in the preceding tables. The North American respondents can be viewed as holiday tourists with a special interest in shopping, more so than South American and Caribbean respondents. It is probably the type of visitor of whom people think when they talk about Curaçao as a buying spot.

The shopping tourist from South America and the Caribbean area are practically only interested in shopping and aspects which may be related to shopping (taxies, infrastructure, public transport). Contrary to their North American counterparts they are to be found in the free zone where they can buy tax free. They arrive with lots of empty suitcases and bags and they are full when they leave.

Although it is given less attention in publications, shopping tourism from South America and the Caribbean is very attractive for the island. In a very short period of time these visitors spend quite a lot of money and this market is essential to some of the B and C-category hotels.

The assortment wanted by this type of visitor needs to be monitored carefully. Flexibility within the product assortment is essential since a change downward in the political and economical situation in one of the main countries could mean a total collapse. For instance Jamaica. The number of visitors increases strongly. But one of the reasons why people

come is the fact that the Jamaican government is very flexible concerning import duties.

Should the products bought also become widely available in Jamaica or should the government there change their policy concerning import duties, the incentive for the Jamaicans disappears. The same goes for the political instability of Haiti, Surinam and the current change of government on Jamaica.

How should the shopping tourism market be approached? Since shopping tourism depends, to quite a great extent, on the political and economical situation in the source market which is often instable and impossible to influence, a kind of hit-and-run tactics might be most appropriate. This means that should an important market vanish, the product assortment offered should be flexible so that other markets might easily be attracted supported by initially heavy advertising since word of mouth advertising takes over very rapidly.

Many people from Curaçao go to Venezuela for shopping. This is because for Curaçaoans Venezuelan goods are cheaper which makes the trip worthwhile. Should Venezuela create the same kind of facilities as available on Curaçao with mainly products manufactured in Venezuela, buying tourism may shift from Curaçao to Venezuela.

Risks associated with this form of tourism are excessive. Close monitoring of political and economical factors in potential and target markets, together with a flexible assortment directed strongly to the needs and wants in the market and heavy advertising in new markets seem to be the best policy.

The number of European and North American shopping tourists coming to Curaçao is only small. Visitors who come for shopping will probably look for more exclusive goods for relatively low prices. The assortment of goods available on Curaçao and the way they are offered do not meet the assortment and shop design offered elsewhere. If the assortment for this market can't be improved within a short period of time, this market should not be given too much attention.

9.4. BUSINESS TOURISM (number of respondents is 81)

Respondents who stated that the purpose of their visit was business or business and pleasure were distributed into two groups. One group constituted of visitors from Europe and North America (EU/NA) while the second group contained visitors originating from South America, Central America and the Caribbean area (S,CA/CA).

15.7% of the European/North American respondents came by a mode of transportation other than scheduled air. For the other group this percentage was only 3.4%.

For 76.5% of the European/North American respondents business was not the only reason visiting Curaçao. Pleasure was also of great importance. For only 31.0% of the South, Central American/ Caribbean group the trip contained time for pleasure besides business.

Respondents were distributed over the following age classes:

	EU/NA	S,CA/CA
below 21 years	3.9%	0.0%
between 21-40 years	54.9%	96.6%
between 41-60 years	35.3%	3.4%
older than 60 years	5.9%	0.0%

The marital status was distributed as follows:

	EU/NA	S,CA/CA
married	56.9%	51.7%
single	37.3%	41.4%
divorced	2.0%	6.9%
widowed	0.0%	0.0%
other	2.0%	2.0%

43.1% of the European/North American and 69.0% of the South, Central American/ Caribbean respondents had children. The childrens' age was distributed over the following classes:

	EU/NA	S,CA/CA
below 6 years	13.6%	40.0%
between 6-15 years	13.6%	30.0%
older than 15 years	63.6%	10.0%
a combination of 1,2 or 3	9.2%	20.0%

From the preceding a table of the respondents' phase in the life cycle was made and is shown below.

table 9.4.1. Respondents phase in the life cycle

	below 21 2.5	between 21-40 70.0	between 41-60 23.8	older than 60 3.8	total 100
marital status					
married	— (—.)	42.9 (30.0)	89.5 (21.3)	100 (3.8)	(55.0)
unmarried ¹	100(2.5)	57.1 (40.0)	10.5 (2.5)	— (—.)	(45.0)
children					
no	100	58.9	15.8	—	
yes	—(—.)	41.1 (54.8)	84.2 (38.1)	100 (7.1)	(100)
age children					
below 6	— (—.)	47.8 (26.2)	— (—.)	— (—.)	(26.2)
between 6-15	— (—.)	26.1 (14.3)	18.8 (7.1)	— (—.)	(21.4)
older than 15	— (—.)	4.3 (2.4)	75.0 (28.6)	100 (7.1)	(38.1)
combination	— (—.)	21.7 (11.9)	6.2 (2.4)	— (—.)	(14.3)

1 Respondents who were divorced or widowed were also grouped under unmarried

Respondents travelled in the following groups:

	EU/NA	S,CA/CA
alone	23.5%	37.9%
spouse/partner	35.3%	10.3%
spouse/children	5.9%	6.9%
friends	13.7%	10.3%
other	21.4%	34.5%

Respondents travelled with the following number of relatives:

number of relatives	EU/NA	S,CA/CA
0	54.9%	78.3%
1	33.3%	6.9%
2	5.9%	3.4%
3	5.9%	6.9%
4	0.0%	3.4%

Respondents from Europe and North America go more often on a business trip than respondents from South, Central America and the Caribbean area. 65.4% respectively 42.9% goes twice a year or more than twice a year. 30.6% of the European/North American group goes once every year and 4.1% less than once a year. Of the South, Central American/Caribbean group 50.0% goes once a year and 7.1% less than once a year.

In contrast to visitors who came for a holiday or shopping, business tourists stated more often that their trip wasn't financed by their own means. 58.8% of the respondents from Europe and North America and 55.2%

of the respondents from South, Central America and the Caribbean area had another financier.

Only few respondents stated that they were on a package tour. 13.7% of the European/North American group and 10.3% of the South, Central America and the Caribbean area.

The length of stay between the two groups differed significantly and was distributed as follows:

	EU/NA	S,CA/CA
less than a week	35.3%	65.5%
1-2 weeks	27.5%	17.2%
2-3 weeks	3.9%	6.9%
4 weeks or more	33.3%	10.3%

76.5% of the European/North American group stayed in a hotel. These respondents all stayed in a A-category hotel. 11.8% stayed with friends or relatives and 11.8% had another form of accommodation. 93.1% of the respondents from South, Central America and the Caribbean area stayed in a hotel. 55.6% stayed in a A-category hotel, 33.3% in a B-category hotel and 11.1% in a C-category hotel. 6.9% had another form of accommodation.

SOCIAL CLASSES

76.5% of the respondents from Europe and North America and 89.7% of the respondents from South, Central America and the Caribbean area were employed or self employed. Those who weren't were distributed over the following classes:

	EU/NA	S,CA/CA
housewife/man	41.7%	66.7%
student	41.7%	0.0%
retired	16.7%	0.0%
looking for a job	0.0%	33.3%

In cases other than student, most respondents who weren't employed or self employed travel with someone who is.

Respondents that were employed or self employed were distributed over the following sectors:

	EU/NA	S,CA/CA
commercial service sector	71.8%	70.4%
non-profit service sector	15.4%	3.7%
industrial sector	12.8%	25.9%
agricultural sector	0.0%	0.0%

Respondents had received the following degrees of education:

	EU/NA	S,CA/CA
no formal education	2.0%	3.6%
elementary	2.0%	10.7%
high school	37.3%	21.4%
college	33.3%	35.7%
university	25.5%	28.6%

Incomes had the following distribution (in US dollars):

	EU/NA	S,CA/CA
between 0-30 thousand	36.4%	59.3%
between 31-50 thousand	22.7%	25.9%
between 51-70 thousand	13.6%	11.1%
between 71-90 thousand	15.9%	0.0%
more than 90 thousand	11.4%	3.7%

As was seen already with earlier comparisons, respondents from South America and the Caribbean area had lower incomes compared to Europeans and North Americans.

The budgets (in US dollars) were distributed as follows:

	EU/NA	S,CA/CA
Less than \$1000	41.9%	55.0%
between \$1000-\$3000	37.5%	30.0%
more than \$3000	20.6%	15.0%

Regarding the respondents' characteristics, business and holiday tourists don't differ in many respects. Whether there are differences between these two groups regarding scores on touristic aspects will appear from the tables presented below.

Table 9.4.2. Comparison between importance and quality scores for the North American and European business tourists (**)

	importance	quality	N	sign
sun	3.38 (1)	3.68 (1)	50	0.001
beaches	3.33 (2)	2.83 (6)	48	0.001
cleanliness	3.22 (3)	2.00 (21)	49	<0.001
hotel location	3.21 (4)	2.82 (7)	38	0.004
tropical environment	3.17 (5)	2.77 (8)	48	0.009
complaint processing	3.04 (6)	2.26 (18)	23	0.001
taxies	3.03 (7)	2.61 (14)	36	0.006
public transport	3.03 (7)	2.10 (20)	29	<0.001
restaurants in general	3.00 (9)	2.74 (9)	43	0.047
evening out opportunities	2.94 (10)	2.67 (11)	36	N.S.
hotel restaurant	2.94 (10)	2.20 (19)	35	<0.001
availability of other sports	2.93 (12)	2.44 (16)	27	0.030
availability of watersports	2.91 (13)	3.00 (3)	32	N.S.
Curacaoan culture	2.89 (14)	2.63 (13)	46	N.S.
guided tours	2.87 (15)	3.13 (2)	15	N.S.
infrastructure	2.87 (15)	2.33 (17)	46	0.002
roomservice	2.78 (17)	2.91 (4)	23	N.S.
hotel price	2.72 (18)	2.66 (12)	29	N.S.
architecture	2.70 (19)	2.91 (4)	44	N.S.
shopping opportunities	2.44 (20)	2.46 (15)	39	N.S.
other sights	2.08 (21)	2.74 (9)	43	N.S.

N.S. means that the differences are not statistically significant at $P < 0.05$.

The quality scores on courtesy, professionalism, correctness and friendliness were distributed as follows. They are not presented in the figure.

	quality	N
courtesy	2.67	39
professionalism	2.45	40
correctness	2.77	39
friendliness	2.95	38

Table 9.4.3. Comparison between importance and quality scores for the South American and Caribbean business tourists (##)

	importance	quality	N	sign
cleanliness	3.63 (1)	2.96 (5)	24	0.001
Curacaoan culture	3.50 (2)	2.85 (9)	20	0.019
restaurants in general	3.45 (3)	2.95 (6)	20	0.021
taxies	3.44 (4)	3.00 (3)	25	0.046
evening out opportunities	3.24 (5)	2.71 (11)	21	N.S.
availability of other sports	3.24 (5)	2.06 (20)	17	0.001
beaches	3.23 (7)	2.68 (13)	22	0.036
sun	3.18 (8)	3.41 (1)	22	0.021
tropical environment	3.18 (8)	3.09 (2)	22	N.S.
complaint processing	3.16 (10)	2.47 (19)	19	0.038
hotel location	3.15 (11)	3.00 (3)	27	N.S.
infrastructure	3.15 (11)	2.90 (8)	20	N.S.
roomservice	3.14 (13)	2.71 (11)	21	N.S.
hotel restaurant	3.14 (13)	2.67 (14)	21	N.S.
hotel price	3.09 (15)	2.72 (10)	22	N.S.
availability of watersports	3.06 (16)	2.06 (20)	17	0.007
shopping opportunities	3.00 (17)	2.56 (17)	25	0.018
public transport	2.86 (18)	2.62 (16)	21	N.S.
architecture	2.64 (19)	2.95 (6)	22	N.S.
guided tours	2.43 (20)	2.57 (18)	14	N.S.
other sights	2.20 (21)	2.67 (14)	15	0.014

N.S. means that the differences are not statistically significant at $P < 0.05$.

The quality scores on courtesy, professionalism, correctness and friendliness were distributed as follows. They are not presented in the figure.

	quality	N
courtesy	3.07	27
professionalism	2.81	26
correctness	3.08	25
friendliness	3.37	27

Table 9.4.4. Comparison between importance scores of business tourists from Europe and North America against business tourists from South, Central America and the Caribbean.

	EU/NA	N	S,CA/CA	N	sign
sun	3.38 (1)	50	2.96 (10)	26	0.050
beaches	3.33 (2)	49	2.89 (13)	28	0.058
cleanliness	3.22 (3)	50	3.62 (1)	26	0.003
hotel location	3.21 (4)	38	3.15 (5)	27	N.S.
tropical environment	3.16 (5)	50	3.09 (7)	23	N.S.
complaint processing	2.92 (6)	38	3.04 (9)	23	N.S.
restaurants in general	2.90 (7)	49	3.17 (3)	24	N.S.
Curaçaoan culture	2.90 (7)	50	3.12 (6)	26	0.026
other sights	2.89 (9)	46	2.19 (20)	21	0.013
hotel restaurant	2.87 (10)	39	3.17 (3)	24	N.S.
infrastructure	2.86 (11)	50	3.09 (7)	22	N.S.
architecture	2.76 (12)	49	2.42 (19)	26	N.S.
taxies	2.67 (13)	49	3.42 (2)	26	<0.001
evening out opportunities	2.60 (14)	48	2.81 (16)	26	N.S.
public transport	2.55 (15)	49	2.52 (18)	27	N.S.
availability of watersports	2.51 (16)	49	2.59 (17)	22	N.S.
hotel price	2.47 (17)	38	2.96 (10)	26	0.031
shopping opportunities	2.32 (18)	50	2.89 (13)	28	0.027
roomservice	2.32 (18)	37	2.96 (10)	23	0.032
availability of other sports	2.24 (20)	49	2.82 (15)	22	0.046
guided tours	1.98 (21)	47	2.09 (21)	22	N.S.

N.S. means that the differences are not statistically significant at $P < 0.10$.

Since in more cases the trip isn't financed by the respondents' own means, price is less important.

In a lot of cases it seems that if respondents have to be on the island, it might as well have all the advantages of a tropical island and since it is tropical well suited for holiday, the business tourist may take their spouse/partner with them.

On an average, business tourists stay on the island for only a short period (i.e. not taking students and people working on a project into account). Comparing hotel prices on Curaçao with hotel prices of (business) hotels in London, Tokyo, Paris and even Frankfurt, prices on Curaçao are much lower. On the other hand compared to the cities mentioned Curaçao is not a centre of business. Still, business tourists seem to be able and willing to pay higher prices and want service and quality in return. Money spent on touristic activities is lower compared to holiday tourists because of time constraints. After work they probably want to relax and enjoy the last rays of the afternoon sun.

With the opening of the International Trade Centre (ITC), new opportunities to attract business tourism have been created. Regarding business tourism, prestige and status might be important factors. Many demand first class facilities and service.

In the current hotels no price discrimination policy can be used between holiday and business tourism. The higher prices business tourists are able and willing to pay can't be yielded if the current type of holiday tourism is continued. Almost all A-category hotels depend on holiday tourism.

The TTC facilities have been built because there seems to be a potential market. This market will create new flows of traffic. Since the current hotels which operate on the current holiday market won't be able to take advantage of the higher prices business tourists are able to pay without losing part of the holiday segment, there are opportunities for new hotels. But, a new hotel will face strong fluctuations in occupancy rates since conferences won't be held every week. The extra margins between revenues and costs will often be necessary to compensate for fluctuations in occupancy rates.

Because of higher prices a new hotel won't attract many visitors from the present holiday segment. By moving to a more expensive segment in the holiday market, there are more opportunities for present hotels. They may also attract more business tourism which may be very advantageous during the off season.

More expensive business tourism may enforce more expensive holiday tourism and vice versa. To attract more business tourism effort have to be made to attract conferences, symposia etc. and make full use of the island's advantage of being a member of the League of American States and a member of the European Community regarding trade.

10. COMPARISONS BETWEEN VISITORS WITH VARYING PURPOSES

In order to see if differences exist between types of visitors scores on "mental" aspects (rest to other comfort) are compared for the various purposes of visit (holiday, cruise, shopping, business). The questions were answered with yes or no.

Do visitors come for their rest?

				HOL	CRU	SHO	BUS
	yes	no					
holiday	87.0%	13.0%	HOL	----	.059	.000	.000
cruise	76.2%	23.8%	CRU	.059	----	N.S.	.018
shopping	61.1%	38.9%	SHO	.000	N.S.	----	N.S.
business	54.3%	45.7%	BUS	.000	N.S.	.018	----

Social contacts are not desired?

				HOL	CRU	SHO	BUS
	yes	no					
holiday	21.4%	78.6%	HOL	----	N.S.	N.S.	N.S.
cruise	26.2%	73.8%	CRU	N.S.	----	N.S.	N.S.
shopping	13.9%	86.1%	SHO	N.S.	N.S.	----	N.S.
business	24.7%	75.3%	BUS	N.S.	N.S.	N.S.	----

Do visitors want to learn about Curaçaoan culture?

				HOL	CRU	SHO	BUS
	yes	no					
holiday	78.0%	22.0%	HOL	----	N.S.	N.S.	N.S.
cruise	73.8%	26.2%	CRU	N.S.	----	N.S.	N.S.
shopping	75.0%	25.0%	SHO	N.S.	N.S.	----	N.S.
business	82.7%	17.3%	BUS	N.S.	N.S.	N.S.	----

Do they want many activities to be offered?

				HOL	CRU	SHO	BUS
	yes	no					
holiday	61.6%	38.4%	HOL	----	N.S.	N.S.	N.S.
cruise	73.8%	26.2%	CRU	N.S.	----	N.S.	N.S.
shopping	66.7%	33.3%	SHO	N.S.	N.S.	----	N.S.
business	66.7%	33.3%	BUS	N.S.	N.S.	N.S.	----

Do they want to gain a general impression?

				HOL	CRU	SHO	BUS
	yes	no					
holiday	92.3%	7.7%	HOL	----	N.S.	.019	N.S.
cruise	92.9%	7.1%	CRU	N.S.	----	.090	N.S.
shopping	80.6%	19.4%	SHO	.019	.090	----	.097
business	91.4%	8.6%	BUS	N.S.	N.S.	.097	----

Do they want to escape the monotony of daily life?

				HOL	CRU	SHO	BUS
	yes	no					
holiday	43.3%	46.7%	HOL	----	N.S.	N.S.	N.S.
cruise	52.4%	47.6%	CRU	N.S.	----	N.S.	N.S.
shopping	47.2%	52.8%	SHO	N.S.	N.S.	----	N.S.
business	59.3%	40.7%	BUS	N.S.	N.S.	N.S.	----

Do they think contact with the locals is important?

				HOL	CRU	SHO	BUS
	yes	no					
holiday	81.7%	18.3%	HOL	----	N.S.	N.S.	N.S.
cruise	71.4%	28.6%	CRU	N.S.	----	N.S.	.091
shopping	75.0%	25.0%	SHO	N.S.	N.S.	----	N.S.
business	85.2%	14.8%	BUS	N.S.	.091	N.S.	----

Do they think a holiday ought to be planned carefully?

				HOL	CRU	SHO	BUS
	yes	no					
holiday	45.8%	54.2%	HOL	----	.001	.010	N.S.
cruise	85.7%	14.3%	CRU	.001	----	N.S.	.003
shopping	80.6%	19.4%	SHO	.010	N.S.	----	.025
business	59.3%	40.7%	BUS	N.S.	.003	.025	----

Do they think you can't have the comfort you have at home?

	yes	no		HOL	CRU	SHO	BUS
holiday	63.5%	36.5%	HOL	----	N.S.	N.S.	N.S.
cruise	69.0%	31.0%	CRU	N.S.	----	.069	N.S.
shopping	52.8%	47.2%	SHO	N.S.	.069	----	N.S.
business	61.7%	38.3%	BUS	N.S.	N.S.	N.S.	----

11. COMPARISON OF SOURCES OF KNOWLEDGE FOR THE VARIOUS PURPOSES OF VISIT

Table 10 Sources of knowledge about Curaçao for the various purposes^{1,2}

	holiday	cruise	shopping	business
social contacts	32.3%	7.5%	59.3%	20.7%
commercial sources	24.9%	55.0%	22.1%	28.7%
public sources	10.4%	8.6%	3.4%	10.9%
own experience	32.4%	35.0%	15.2%	39.7%

- 1 When more than one source was named, the sources are assumed to have an equal weight
- 2 own experience covered everything that couldn't be put in the other sources e.g. learned about at school, earlier visits, found on the map etc.

12. ADVERTISING IN MAGAZINES

Concerning magazines read by respondents, the percentages found give an indication of the maximum percentage of potential visitors which can be exposed, at least one time, to advertising in a certain magazine. Assumptions underlying these percentages are:

- If a respondent reads two kinds of magazines it is assumed that he will be exposed twice if the add is printed in both magazines. If the read more than two magazines they will be exposed four times.
- It is assumed that respondents read the magazines every week

Table 11 percentages of potential visitors who are exposed at least 1 time to a certain add in various magazines

	holiday	cruise	shopping	business
opinion magazine	30.1%	21.6%	14.7%	29.1%
popular magazine	36.1%	40.5%	36.6%	37.3%
information magazine	64.2%	64.8%	58.7%	59.4%
hobby magazine	15.5%	21.6%	24.4%	17.5%

Table 12 percentages of potential visitors who are exposed at least 1 time to a certain add in the various magazines in relation with other magazines¹

	holiday	cruise	shopping	business
opinion magazine	20.6%	14.5%	10.9%	20.3%
popular magazine	24.7%	27.3%	27.2%	26.0%
information magazine	44.0%	43.6%	43.7%	41.5%
hobby magazine	<u>10.6%</u>	<u>14.5%</u>	<u>18.2%</u>	<u>12.2%</u>
total	100.0%	100.0%	100.0%	100.0%

1 These percentages indicate exposure rate in relation with other magazines. This percentage can be used to allocate the budget over the types of magazines.

Whether or not respondents would advise friends and relatives to come to Curaçao had the following distribution over the various purposes of visit.

	yes	no
holiday	88.2%	11.8%
cruise	97.6%	2.4%
shopping	98.1%	10.9%
business	86.4%	13.6%

13. FUTURE RESEARCH

With the experience gained from this research, some recommendations concerning future research will be presented below in order to prevent some of the same difficulties I experienced.

A research of the composition and features of the source market is recommended strongly. Together with the results found in this research, numeric targets could be presented.

Other activities and facilities mentioned in the research which should receive more study won't be repeated here.

The same kind of research should be held on a regular basis in order to see if the tourist population is moving to the desired segment and second, in order to see if scores on certain aspects have improved.

Concerning the rating of some aspects, questions could be more specific in order to get an answer that is more specific, for example by adding to the question how often certain facilities (such as taxis, public transport) are used or what places and facilities are visited and how often (shopping, other sights, sports facilities). This way better and deeper insight in the visitors' time spending is obtained.

Also a question whether respondents know that certain facilities and sights are available might be asked and if yes one might ask how they knew.

Concerning budgets, smaller differences in classes could be made in order to get a more precise answer. This is especially necessary for visitors who stay less than a week or only one day.

The question concerning travelling group should also contain the answer spouse/partner and friends which prevents the category "other" from becoming a too high unspecified percentage.

Redefinition of question 19 about motivations and activities might make the answers more discriminating and hence different types of tourists might be distinguished better. This might be achieved by giving the possible answers more graduation (e.g. none, some, quite some and a lot).

Question 27 (advice) could be restated or a question could be added in order to be able to ask respondents if they would recommend Curaçao to friends and relatives more strongly than other islands/countries and/or if they rate Curaçao higher or lower than other islands/countries.

It is also recommended, especially with regard to the touristic aspects, to use different questionnaires for different purposes of the visit. This way time is saved regarding aspects which are not important to certain visitors and about which they only have a vague opinion (e.g. importance or other sights for Caribbean shopping tourists or evening out opportunities for cruise passengers). On the other hand important aspects could be elaborated for specific groups. For instance, regarding shopping tourism questions about the assortment might be asked and regarding cruise tourism questions about how they spend their time and how much time for what kind of activities.

APPENDIX A.

QUESTIONNAIRE THESIS RESEARCH L. ARIS, CURAÇAO 1987-1988

PURPOSE: TO GATHER INFORMATION ABOUT TOURISM TO CURAÇAO

no.	male/female	alone/in company
date	day:	hour:

1) How did you come to
Curacao?

- 1) scheduled air
2) charter air
3) cruiseship
4) ferry
5) other

2) What is the purpose of
your visit to Curacao

- 1) holiday
2) shopping
3) shopping and pleasure
4) business
5) business and pleasure

3) Where do you live?

city
state/province
country

4) In which category is your
age

- 1) below 21 years
2) between 21 - 40 years
3) between 41 - 60 years
4) older than 60 years

5) Are you employed or self
employed?

- 1) yes ☐ if yes, go to
2) no ☐ question 7

6) If you are not employed,
are you

- 1) retired
2) entered early retirement
3) looking for a job
4) housewife/houseman
5) student
6) other

Go to question 8

7) If you are employed, which
business sector are you
associated with?

- 1) agricultural sector
2) industrial sector
3) commercial service sector
4) non-profit service sector

8) Which level of education
did you complete?

- 1) no formal education
2) elementary school
3) high school
4) college
5) university

9) What is your marital status?

- 1) single
- 2) married
- 3) divorced
- 4) widow(er)

10) Do you have children?

- 1) yes
- 2) no

if no go to question 12

11) In which category are your children?

- 1) below 6 years
- 2) between 6 - 15 years
- 3) older than 15 years
- 4) a combination of 1,2 of 3

12) Whom are you traveling with?

- 1) alone
- 2) with spouse/partner
- 3) with spouse and children
- 4) with friends
- 5) with spouse, children and friends
- 6) other

When answering 1) or 4) go to question 14

13) With how many relatives are you traveling?

- 1) 1
- 2) 2
- 3) 3
- 4) 4
- 5) other ...

14) How often are you on a holiday

- 1) once a year
- 2) twice a year
- 3) more than twice a year
- 4) every two years
- 5) less than once every two years

15) Is your stay on Curacao a portion of a package tours

- 1) yes
- 2) no

16) How long do you intend to stay?

- 1) less than a week
- 2) 1 - 2 weeks
- 3) 2 - 3 weeks
- 4) 4 weeks or more

17) Where are you staying during your visit on Curacao?

- 1) hotel
- 2) friends or relatives
- 3) other

When answering 2) of 3) go to question 19

18) In which hotel are you staying

- 1) Caribbean (Hilton)
- 2) Plaza
- 3) Holiday Beach
- 4) Las Palmas (A. Frommer)
- 5) Princess Beach
- 6) Avila Beach
- 7) San Marco
- 8) Hotel Holland (Bianca)
- 9) Coral Cliff
- 10) Tropical Inn (Country)
- 11) anders

19) Would you agree or disagree with the following statements?

a) I am on a holiday to have a rest?

1) agree

2) disagree

b) During my holiday I have no desire for social contacts

1) agree

2) disagree

c) During my stay on Curaçao I want to learn a lot about the Curaçaoan culture?

1) agree

2) disagree

d) I prefer holiday destinations offering a lot of activities

1) agree

2) disagree

e) I want to get a general impression of a country during my holiday.

1) agree

2) disagree

f) I am on a holiday to escape the monotony of daily life.

1) agree

2) disagree

g) During my holiday it is important to have personal contact with the locals.

1) agree

2) disagree

h) A holiday ought to be planned carefully

1) agree

2) disagree

i) During your holiday you can't expect the comfort you have at home.

1) agree

2) disagree

20) Below you find a list of touristic aspects of Curaçao. Please give your opinion on both the importance and quality of these aspects. Please rate your judgement on a scale from 1 up to and including 4.

IMPORTANCE

- 1)=not important
- 2)=less important
- 3)=important
- 4)=very important

QUALITY

- 1)=poor
- 2)=average
- 3)=good
- 4)=excellent

	IMPORTANCE	QUALITY
- hotel location		
- hotel price		
- roomservice		
- hotel restaurant		
- restaurants in general		
- complaint processing		
- shopping opportunities		
- evening out opportunities		
- the Curaçaoan culture		
- guided tours		
- wide selection of marine sport facilities		
- wide selection of other sport facilities		
- beaches		
- sun		
- the infrastructure		
- the tropical environment		

- public transport
- taxi services
- architecture
- other sights
- cleanliness of the island
- other namely

The following aspects are related to personnel in hotels. Please give your judgment only on quality. 1=poor, 2=average, 3=good, 4=excellent.

QUALITY

- courtesy personnel
- professionalism personnel
- correctness personnel
- friendliness personnel

21) In which category would you place your annual gross income (in dollars)?

- 1) 0 - 30 thousand
- 2) 31 - 50 thousand
- 3) 51 - 70 thousand
- 4) 71 - 90 thousand
- 5) more than 90 thousand

22) Is this trip mainly financed by your own means?

- 1) yes
- 2) no

go to 24 if no and when you didn't answer in question 2, purpose of your visit, business or business and pleasure,

23) What is approximately the budget for the time you are on Curaçao excluding traveling costs (in dollars)

- 1) up to 1000
- 2) between 1000 - 3000
- 3) more than 3000

24) What kind of periodicals do you read most?

- 1) opinion magazines
- 2) popular magazines
- 3) informative magazines
- 4) hobby magazines

more answers than one are possible

25) how did you learn about
Curacao?

- 1) social contacts
- 2) commercial sources
- 3) public sources
- 4) own experience

more answers than one are possible

26) What is our religion?

- 1) Muslim
- 2) Christian
- 3) Jewish
- 4) Hindu
- 5) Buddhist
- 6) Atheist
- 7) other

27) Would you recommend friends
and relatives to come to
Curacao?

- 1) yes
- 2) no

End of the interview. Thank you very much.

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